

**FACILITIES  
CONSTRUCTION PROJECT PROCEDURES MANUAL  
The University of North Texas**

**June 2010**





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FACILITIES PROJECT PROCEDURES MANUAL

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UNIVERSITY OF NORTH TEXAS  
OFFICE OF FACILITIES MANAGEMENT AND CONSTRUCTION

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SECTION A - PROCEDURE SUMMARIES

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\*\*\* NOTE: For further detail on project procedures, review Sections B through F. \*\*\*

**1.0 PROJECT DECISION LIST**

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1. PIW received. **Gail** e-mails to: **FACL-FMC-PIWNotify** email group list (reference section J, p.103-104 for members)
  - a. Gail sets up project in TMA and creates file folder for **PM**
2. Is this a furniture only project?
  - a. If yes, **PM** assigned by: **Tessa** (e-mail notification that this is a furniture-only project to **FACL-FMC-PIWNotify**, cc **PM**)
  - b. **PM** works with clients on design, estimate, procurement and installation
3. Is this a maintenance project? Decision by **Helen, Jeff, Keith C., and Tessa**. (Cc: **Charlie & Director of Facilities Business Services**)
  - a. If so, no **PM** is assigned and the project does not follow this process.
4. If not a maintenance project then:
  - a. **PM** assigned by: **Tessa** (e-mail reply to **FACL-FMC-PIWNotify**, cc **PM**)
  - b. Projects involving in-depth MEP work may be assigned to a **PM** in FM by Jeff Brown
5. **PM** works with client on scope & design
6. **PM** prepares plans and itemized estimate.
  - a. **PM** to obtain completed move matrix and signed space plan from client at this point
  - b. **PM** to obtain estimate for asbestos abatement and air monitoring at this time (coordinate with Mike Reynolds and cc Lynda Hutson)
  - c. **PM** to obtain estimates for fire and life safety work at this time (cc Keith W. and Willie H.)
7. **PM** puts plans out for Design Review process:
  - a. **Keith C.** indicates delivery method (In-House crew or JOC) on Design Review Sign-in Sheet. **PM** may address special circumstances (such as schedule, etc.) that may require further group discussion of selected method with **PM**, **Keith Cook**, **Dick Milan**, **Jeff Brown**, and **Helen Bailey**, with final decision to be made by **Helen & Jeff**.
  - b. In-house construction crew workload to be reviewed at the end of every Monthly Projects Meeting by **Helen, Jeff, Keith C., Dick, Tessa, and PM's**
  - c. If JOC then a superintendent is not required. **PM** coordinates construction and requests inspections through **Sharon Kirkpatrick** as required.
  - d. If in-house, **Dick** acts as **Superintendent** and notifies **Lynda H.** to create project folder
  - e. At end of Design Review period, **PM** incorporates revisions into final drawing set

8. **PM** sends estimate by e-mail to **Ed (cc: Tessa)** to finalize
  - a. **PM** to submit Remedy ticket at this time
  - b. **PM** emails plans and completed move matrix to **Dowl, Blake Myer, CR Chevli, Ken Sedgely, and Gary Primeaux** for estimate at this point
9. **Ed** investigates MEP issues/costs with shops as needed
10. **PM** coordinates asbestos issues with **Mike Reynolds (cc Matt Moncus and Lynda Hutson)**
11. **PM** coordinates fire protection and suppression issues with Fire Safety contractor (**cc Keith W. and Willie H.**)
12. **Ed** compiles estimate and within 3 - 5 days, completed estimate is returned to **PM**.
  - a. If total project cost is greater than \$45K, add line item in estimate for IDIQ A/E services and change administrative charge to 4.5% (reference section I, p.90.)
13. **PM** sends estimate and plans to **Helen, Jeff, and Tessa** for final review/approval by their internal staff as necessary.
  - a. After package is approved, **PM** to review estimate and plans with client.
  - b. For In-House projects only, blind carbon-copy **FACL-FMC-InHouseEst** when estimate is emailed to client.
14. After client signature and approval by Budget Office, **PM** requests project funding be pulled by **Director of Facilities Business Services** and arrangement for construction & procurement begins (attach signed NTE budget)
  - a. **PM** to obtain formal fire safety proposal(s) at this time and request PO
15. Before construction begins, a pre-con meeting is held attended by **PM, Dick (if in-house), & members of FACL-FMC-PreCon** email group list as required (reference section J, p.103-104 for list of members). Meeting generally includes a site visit.
  - a. If JOC or GC, **PM** to ensure that contractor brings schedule to pre-con meeting
  - b. If In-House, **D. Milan** to provide schedule at pre-con meeting
16. Procurement of project specific carpet, VCT, rubber base, and specialty items:
  - a. If In-house project, **PM** will work with vendor on quotes, request PO's and coordinate delivery with **Dick**.
  - b. If JOC project, contractor will procure all finishes unless otherwise noted

**Construction Phase:**

17. **Superintendent** responsibilities: coordinates all trades (including Telecomm/Datacomm) and requests all work orders or PO's for the various construction trades. **PM** provides all necessary information regarding the project scope and is kept informed of progress. **PM** addresses design issues and field decisions if it affects the intended design, scope or budget.

Before construction begins, a pre-construction meeting should be coordinated by the **PM** and attended by the Superintendent and members of **FACL-FMC-PreCon** email group list. Superintendent is responsible for providing a construction schedule to the **PM** for publication to client and outside vendors.



- a. **Superintendent** is responsible for keeping the project on schedule and in budget as per established plans and signed NTE budget.
  - b. **Superintendent** is responsible for jobsite supervision, coordination and safety (including proper dust control measures)
  - c. **Superintendent** coordinates all work with all job trades
  - d. **Superintendent** coordinates all inspections and copies **PM** on all inspection forms (except inspections pertaining to Fire and Life Safety, which **PM** coordinates)
  - e. **Superintendent** to keep **PM** informed of all procurement decisions (ie. What trades are in-house or contracted out)
  - f. Communication :
    - i. **Superintendent** funnels all communication from trades, scheduling, etc. to the **PM** and vice-versa
    - ii. **PM** funnels all communication from **Superintendent** to the client and vice-versa
  - g. **Superintendent** to provide **PM** with e-mail or phone updates (Frequency: typically twice a week but depending on the type of project, **PM** may determine a different frequency is appropriate.)
  - h. At the beginning of the job, **Superintendent** requests all work orders through Lynda Hutson (cc: **Gail H and Laura Raadt**) if In-House. If JOC, **PM** creates work orders.
  - i. **PM** provides Superintendent with 3 copies of the construction plans. (more can be provided if needed)
  - j. If there are any necessary changes to the drawings during construction **PM** will re-issue affected pages of the set, clearly noting the revision date, provide **Superintendent** with 3 sets, and discard the old drawings.
  - k. A current set of plans is posted by **Superintendent** at all times at the entrance to the jobsite along with other safety information
  - l. **Superintendent** is responsible for keeping the jobsite secure
  - m. **PM** coordinates Fire alarm, sprinkler, smoke detector, extinguisher inspection by Keith Wiedower
  - n. Punch list: walk thru with **PM**. **PM** will provide punchlist. **Superintendent** to coordinate completion of remaining work
  - o. Final inspection (**PM & Superintendent**)
18. Upon move-in, **PM** obtains client signature on Certificate of Occupancy (reference section H, p.82 for sample) that denotes move date
19. Project Close-out
- a. When project is 100% complete in TMA, **PM** requests that project be closed (**PM** e-mail to **Director of Facilities Business Services, cc Superintendent, Laura Raadt, Lynda H, and Gail H**)
  - b. **PM** to submit Customer Service Survey to client to fill out and return.
  - c. Completed Certificate of Occupancy and Customer Service Survey (reference section H, p.83) to be saved in project file and linked to TMA project by **PM**. **Director of Facilities Business Services** will supply a reconciliation of the project financials to the **PM**.
  - d. **PM** will coordinate collection of all files from Facilities Maintenance and Business Services and combine into one master file at the end of the project for archiving.

## 2.0 **PROJECT CHECKLIST**

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Maintain the project checklist through the different stages of the project. Reference section H, p.66 for sample "Project Checklist" form.





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SECTION B - PROJECT INITIATION AND ASSIGNMENT

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**1.0 PROJECT INITIATION**

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In order for campus users to make any modifications to their space, either physical or aesthetic, they must procure the services of Facilities staff. In order to better manage requests that differ in scope from campus maintenance issues, the Project Initiation Worksheet (PIW) process was developed by Facilities. A PIW project involves more than one trade and costs in excess of \$3,500. The office of Facilities Management and Construction (FMC) is responsible for managing PIW requests and projects – herein referred to as a “Project.” The single-trade jobs with a cost less than \$3,500 will be handled by the office of Facilities Maintenance – referred to as a “Work Order.” The scope of this manual is to outline and detail the process of handling a PIW project for UNT Facilities.

When the customer has an idea for space modification, they must submit a Project Initiation Worksheet (PIW) with all the required information (detailed below in *1.1.1 – PIW Required Criteria*). All PIWs will be submitted either through interdepartmental mail, via fax to 565-4650, or attached in an e-mail to [piw@unt.edu](mailto:piw@unt.edu) if the client has access to a scanner.

PIW’s will then be reviewed to ensure they are complete and the request will be processed into the project queue by creating a project record in TMA. The bottom portion of the PIW will be completed by Facilities. The processed PIW will then be scanned to create an electronic file in Adobe PDF format to be housed in a central PIW directory by fiscal year. Attachments can then be added to the original PIW e-file – as if the original PIW was the trunk of a tree and the attachments are the branches and leaves that detail certain aspects of the project. Attachments to the PIW file may be red-lined floor plans, correspondence regarding the scope of work, pictures, to name a few examples. An e-mail notification is then sent out containing all the pertinent project information to:

1. Helen Bailey – Director of Facilities Management and Construction (DFMC)
2. Jeff Brown – Director of Facilities Maintenance (DFM)
3. Director of Facilities Business Services (DFBS)
4. Laura Raadt – Work Control Manager
5. Lynda Hutson – Facilities Scheduler
6. Tessa Ryles – Manager of Design and Construction (MDC)
7. Project Manager (if known)

The PIW submission is then logged into the Comprehensive PIW Spreadsheet (<P:\SHARED\Construction Projects\PIW\Comprehensive PIW list>), along with all other information outlined therein. The MDC will respond to the notification e-mail to assign a Project Manager (PM).

See *1.2 – PIW/TMA Project Creation* for detailed project creation process information below.

**1.1 PIW Projects: FMC (Cost > \$3,500; multi-trade; space alteration)**

The Project Initiation Worksheet (PIW) may be found online at <http://www2.facilities.unt.edu/docs/piw.pdf> in writable PDF format [reference section H, p.61 for blank PIW]. Within three to five working days of receiving the PIW assignment, the Project Manager assigned to the PIW will contact the Project Contact/Requestor to find a date and time to meet in order to begin programming the scope of work. During the preliminary programming meeting, the Project Manager will assess the project area and discuss client needs and expectations. This information will then be used to develop preliminary drawings and plans. Facilities engineers will be consulted.

All of this information will then be used to develop an approximate cost range. It will not be a specific price of what the work will cost.

#### 1.1.1 PIW Required Criteria

The following information is required on the PIW before it is considered complete, and therefore be processed:

1. A Deptid or Projid must be provided
2. The Deptid Holder's signature is required
3. The Dean/Director's signature is required
4. Clients may contact Facilities by e-mail at [piw@unt.edu](mailto:piw@unt.edu) with any questions or concerns regarding this process. PIW forms may be submitted via facsimile to 565-4650, through interdepartmental mail, or by e-mail to [piw@unt.edu](mailto:piw@unt.edu) if the client has access to a scanner. Along with the former requirements, the project location (including building/s name and room number/s), project contact person, general description of the work requested, and any other informative details related to the project are highly encouraged.

#### 1.1.2 SAC approval

A PIW that involves space re-assignment should be accompanied by proof of Space Assessment Committee (SAC) review and approval per UNT Policy 10.16.

### 1.2 PIW/TMA Project Creation Details

1. PIW is received and reviewed for completeness.
2. A new TMA project record is created with all the information from the PIW.
3. Bottom portion of the PIW is filled in by Facilities and then the processed form is scanned and the Adobe PDF file for that project is created and saved in the appropriate PIW directory by fiscal year.
  - a. Saving the PIW
    - i. Main PIW Directory: <P:\SHARED\Construction Projects\PIW>. In the main PIW directory, there are sub-directories for the PIWs by fiscal year. A fiscal year at UNT is September 1 through August 31.
    - ii. PIW Naming Convention: (See section B.1.3 below for PIW naming conventions.)  
<Bldg(s)Name>space<Rm#(s)>\_<AuthoredDate>
      1. Use appropriate building acronyms, or spell out the name.
      2. For rooms with the same number but different letters (e.g. 201A) use a comma with no spaces between (e.g. 201A,C,F). For various rooms with different numbers, use a plus sign (e.g. 201E,G+235+349). For a series of rooms, a dash mark is acceptable (e.g. 201A-F; 202-210).
      3. "AuthoredDate" is taken directly from PIW submission, not today's date – unless no date is provided on the form, then take the date it was processed.
    - iii. Attach any pertinent project documents.
      1. E-mails related to the project, such as Deptid info, PM assignment, scope clarification, client approvals, etcetera to the original .pdf file of the PIW.
      2. Any plans, pictures, schematics, etc submitted by the client.
4. The Comprehensive PIW list is updated with the new project information.
  - a. E-mail notification sent to **FACL-FMC-PIWNotify** email group list (reference section J, p.105 for sample notification email and section J, p.103-104 for members of email group list)
  - b. MDC responds with PM assignment
5. Hard copy project file created – multi-tab manila folder
  - a. File is populated with:
    - i. Labels (See section F, p.32 for hard copy file naming conventions and details)
      1. Project Name on File Name Tab.

2. TMA Number on the outside cover of file underneath Project Name
3. Inside labels (in order):
  - a. PIW/TMA/WORK ORDERS
  - b. PROGRAMMING
  - c. ACCOUNTING
  - d. CORRESPONDENCE
  - e. *BLANK*
  - f. PLANS/DRAWINGS
4. Copy of PIW
5. Print out of TMA project screen for that particular project
6. Pertinent e-mail correspondence [piw@unt.edu](mailto:piw@unt.edu) account

### 1.3 PIW Naming Conventions

Please use understandable acronyms for the buildings, or write out the name

The "AuthoredDate" referenced below is taken from PIW – Input format is MMDDYY.

#### 1.3.1 ORIGINAL PIW SUBMISSION

Single Building, Single Room:

*Bldg<space>Rm#\_AuthoredDate.*

Example: GAB 110\_101007

Single Building, Single Room but multiple sub-letters:

*Bldg<space>Rm#<letter(s)>\_AuthoredDate*

Separate rooms with letters (e.g. 201A) with a comma with no spaces between (e.g. 201A,B,C)

Example 1: GAB 110A\_101007

Example 2: GAB 110A,B,C\_101007

Single Building, Multiple Rooms and/or multiple sub-letters

*Bldg<space>Rm#+Rm#+Rm#\_AuthoredDate*

Include various rooms with a plus sign (+)

Example 1: GAB 110+130+278\_101007

Example 2: GAB 110A,B+210+310F\_101007

For various buildings and/or rooms

*Bldg<space>Rm#+Rm#<space>+<space>BldgRm#\_AuthoredDate*

Include various buildings and rooms with the plus sign (+)

Example 1: GAB 110A,B+210+310F+Chilton 110\_101007

Example 2: ESSC 210+GAB 410A,E,F+Matthews 114A-E\_012807

#### 1.3.2 ATTACHMENTS FOR PIW [ "Attachments" folder in every PIW Fiscal Year directory ]

Take the original PIW file name and add an underscore ( \_ ) to the end of the name. Then place a descriptor for the attachment. Save all attachments in the "Attachments" folder in the appropriate PIW Fiscal Year (FY) directory for your PIW. Below are some conventional attachment examples and their descriptor:

TMA Project Number creation e-mail notification:

Admin 210+211\_102307\_TMA#

PIW with Budget Office approval for the project:

GAB 467\_121707\_BudgetAppvl

#### 1.4 Hard Copy File Creation

**File Name Label Convention: On the main label for the folder**

<Building Name> space <Room Number(s)> ¶ (Hit Enter)

<Brief project descriptor>

**TMA Project Number Label: On the outside of the folder underneath the File Name**

< TMA # \_ \_ \_ \_ \_ >

**EXAMPLE:**

STOVALL 175

Remodel Gym into Office Suite

TMA # 10349

File Labels Product Info:

White Removable Filing Labels, 1/3 Cut – Avery Product No. 8066

MS Word template 5366

Go to Tools > Letters and Mailings> Envelopes and Labels

Choose the Labels tab > Then choose Options

Choose “Avery standard” for the Label Products under Label Information

Choose Product Number 5366 > Click OK

Choose New Document > Begin creating labels

#### 1.5 Non-PIW Projects: Maintenance / Work Control (Cost <\$3,500; single trade)

Departments must contact Facilities Work Control and submit a work order. Customers may contact Work Control online at <http://www2.facilities.unt.edu/depts/workcontrol>, or via telephone at 565-2700. If the request is under \$3,500, appears to involve only one trade and does not involve structural modifications, such as installing or removing walls, a Work Order may be submitted to handle the job.

For these type projects, a “not to exceed” amount will be e-mailed to the client/customer. No detailed estimates are prepared for these types of projects. The customer may then accept or reject the estimate. When accepted, the project will be scheduled with Facilities trades. The client will then be billed for the Actual Cost of the project.

## 2.0 PROJECT ASSIGNMENT AND TYPE

Completed PIW forms will be reviewed by the MDC, DFMC, and DFM. Upon review of the scope of work and associated costs, the MDC or designee will assign a Project Manager (PM) for each project, or if workload is prohibitive, the project will be placed in a queue for assignment as soon as workload allows. If a PIW remains in the wait list queue for over four weeks, FMC will contact client with update of expected assignment date.

### 2.1 Facilities Management and Construction (FM&C)

FM&C will operate as the Project Manager on all PIW projects except those deemed to be maintenance or System projects. Responsibilities include, but are not limited to:

1. Investigation and programming
2. Design documentation, including scope of work
3. Development of project estimate
4. Contract documentation, including bid packages and JOC
5. Project documentation, including Purchase Orders, invoices, correspondence, as-builts, etc.
6. Coordinate inspections through FM Supt, file all inspection documentation
7. Project closeout

## **2.2 Facilities Maintenance (FM)**

The head of the In-House Construction Crew will operate as the Project Superintendent on all PIW projects except those that are performed and contracted with a General Contractor (e.g. a JOC, a bid) and those where a PM is assigned from FM. Responsibilities include, but are not limited to construction delivery, coordination of trades, construction supervision, and inspections.

## **2.3 Furniture Procurement Only Projects**

For furniture only projects, the PM is responsible for design, selection (excludes classroom seating), procurement, and oversight/coordination of installation. Reference section D.2.2.1, p.21 for details regarding purchase order requests. Once the furniture is installed, FM&C will service the associated warranty for any products purchased as part of the product. FM will be consulted on any electrical needs for furniture installation.

## **2.4 Classroom Seating**

FM is the client on these projects. No FMC fee will be charged per DFM. PM and FM to discuss vendor options with final selection by FM. FM to approve seating final drawings and vendor proposal before PO is requested by FMC. PM responsibilities include (but are not limited to):

1. Design and layout
2. Development of project estimate for FM approval
3. Providing FM with finish selections for review and approval.
4. Any procurement associated with the project
5. TAS review
6. Oversight and coordination of installation
7. Oversight and coordination of construction as needed

## **2.5 Paint & Carpet Standards**

Final approval of any maintenance paint color and maintenance carpet selection is the responsibility of FM&C prior to ordering any stock materials for the warehouse. FM will provide FMC with carpet vendor choice and carpet specification. All maintenance painting and re-carpeting will use these selections. For placement of accent colors or customer-requested deviations from the paint standards, an FM&C Project Manager should be consulted. FMC will inform customer that carpet is covered under general facilities maintenance **only** in E & G classrooms, common areas, and hallways. In addition, flooring projects that exceed \$50K are subject to TAS review and should include a Project Manager for oversight of the review process.

Maintenance funds will not be used on PIW projects unless otherwise directed by the DFM. PM's should make every effort to adhere to pre-established building standards. If no building standard exists, selections should be made from the standard pre-approved palettes wherever possible. Maintenance painting should also adhere to the Facilities Paint Procedure. For detailed information on the paint procedures, reference section G, p.52-53.







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SECTION C - DESIGN DEVELOPMENT

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**1.0 PROGRAMMING AND DESIGN**

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At this stage in the project, it is the responsibility of the PM to gather information that will ultimately result in the development of design documentation, including scope of work, plans, drawings, client scheduling issues, etc. They must also begin building a project budget using the Facilities Project Budget Form (reference section H, p.71-74) as the basis for construction costs. This preliminary design documentation will be the basis for review, estimating, and revision.

**1.1 Programming: Identify Scope**

Within three to five working days of receiving the assignment, the PM will initiate communication with the Project Contact, either via phone or e-mail, and begin assessing the project scope and timeline for the project. The length of time spent on this step depends on the complexity and scope of the project, as well as current workload of the PM and scheduling issues between client and PM. PM should distribute "What to Expect" memorandum to client at initial meeting (reference section I, p.85-86.)

**1.2 Field Verification and Space Planning**

**1.2.1 Field Verification**

FMC regularly performs a verification of the existing space to be renovated in order to confirm that data within the electronic drawing on file is accurate. A field verification will be performed shortly after the initial meeting between the PM and Project Contact in order to facilitate the space planning and cost estimating processes. Field verifications in vacant spaces are performed as needed; when a space is occupied, the field verification can be scheduled at the convenience of the occupants of the space to minimize any inconvenience.

Reference section H, p.67 for Field Verification Checklist.

**1.2.2 Space Planning**

Space planning is the development of an appropriate floor plan or furniture layout based on information gathered during the programming phase. The space planning phase may result in multiple versions until an approved layout is selected. Once a space plan is approved, the plan is then expanded into a full set of construction drawings.

**1.2.3 Release of Electronic Drawings**

When sending an electronic version of a CAD drawing to a contractor, always attach a copy of the Electronic Drawing Disclaimer (reference section H, p.68 for sample.)

**1.3 Design & Construction Guidelines**

The PM should perform all space planning and design development in conjunction with procedures and guidelines as set forth in the UNT Facilities Design & Construction Guidelines.

## **1.4 Fire & Life Safety Procedures**

### **1.4.1 In-House Projects (no A/E)**

The PM is responsible for obtaining all relevant proposals for any fire protection and suppression work needed for the project. PM's should adhere to the Fire and Life Safety Procedures (reference section G, p.45-49.)

### **1.4.2 IDIQ Projects (designed by A/E)**

The architect or engineer is responsible for the design of the fire protection and suppression systems (unless otherwise noted) as needed for the project. The PM is responsible for confirming the engineer's credentials and the qualifications of the contractor's fire subcontractor(s) prior to moving forward with the job. PM's should adhere to the Fire and Life Safety Procedures (reference section G, p.45-49.)

## **1.5 Asbestos Abatement Procedures**

Project Managers are responsible for ensuring that all appropriate parties are kept apprised of the asbestos abatement portion of each project. For detailed steps of the asbestos abatement procedure, reference section G, p.50-51.

## **1.6 Telecomm & Datacomm Project Procedures**

The move matrix spreadsheet should be emailed to the end user during design development once an approved layout has been identified. Once the end user has filled in the spreadsheet as thoroughly as possible, it should then be routed to their Network Support Manager for review and comment in the event that specialized technical needs exist. Reference section H, p.69 for a sample Move Matrix. After all comments from the end users and their Network Support manager have been received, the matrix and floor plan should be sent to CITC via email (**FACL-FMC-TDComm** email group list – reference section J, p.103-104 for members) to request an estimate for associated costs to be included in the Facilities Project Budget.

PM's are responsible for obtaining pricing for telecomm and datacomm portions of all PIW projects, coordination of telecomm/datacomm work on JOC projects, submission of Remedy tickets, and submission of drawings and move matrices for phone moves. For detailed steps of the Telecomm and Datacomm project procedures, reference section G, p.58.

## **2.0 PROJECT REVIEW AND REVISION**

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### **2.1 Design Review Process**

Upon completion of the design documentation, a formal request for Design Review will be submitted to the **FACL-FMC-DesignReview** email group list for a period of three to five business days. Comments resulting from the Design Review process will be reviewed and incorporated into the project design. Drawings out for Design Review are placed in folders in the design review area outside the DFMC's office. Reference section J, p.103-104 for a list of members of the Design Review email group. Reference section H, p.70 for a sample Design Review Sign-In form.

#### **2.1.1 Delivery Method**

The delivery method will be established during the Design Review process. Upon reviewing the construction drawings, a representative of Facilities Maintenance (Keith Cook or Jeff Brown) should indicate the desired method of delivery (In-house Construction Crew or JOC) by checking the appropriate box and initialing next to their selection. Upon retrieving the documents from review, the PM will proceed accordingly. If the PM has any questions about the selected method of delivery, the final decision will be made by the DFMC and DFM.

### **2.2 Internal Estimate Review and Approval**

Once all comments from Design Review are incorporated into the drawing set, a PDF of the drawings and a PDF of the working estimate should be submitted to the FM&C Estimator for review and revision. Once the Estimator has made any adjustments deemed necessary and the estimate is returned to the PM, the PM will submit the final package for review and approval to the DFMC and DFM (cc MDC and **FACL-FMC-InHouseEst** email group list, reference section J, p.103-104 for list of group members).

### **2.3 TAS Review (Demo/Construction cost >\$45K)**

All projects with total demolition and construction cost over \$50,000 are required to submit for TAS review and inspection. Because of these requirements, any project with a total demo/construction cost over \$45K shall be designed through the IDIQ process by an architectural or engineering firm, depending on project scope. If TAS review becomes necessary during the course of a project that was not previously above the \$50,000 threshold, reference section G, p.59 for detailed steps of the TAS review process. Contact UNT System Facilities for current detailed information in IDIQ processes.

### **2.4 Room Number Assignment**

All room numbers that need to be added, deleted, or revised shall be assigned by the Director of Facilities Management & Construction. Upon project completion, PM's are responsible for submitting Room Number Change email notification (reference section J, p.116 for sample email and section J, p.103-104 for members of **FACL-FMC-RoomChange** email group list).

### **2.5 Client Approvals**

Once the DFMC, DFM, and all other relevant reviewers have provided their approval on the project scope and budget, it can then be presented and explained to the client for their approval. For projects to be completed by In-House crew, blind carbon-copy **FACL-FMC-InHouseEst** on email to client.

The client must provide their approval by providing a signature on both the budget and design document(s). Their signature is taken as proof that they have reviewed, understand, and agree with the information contained therein pertaining to the overall scope and details of the project. Facilities stands behind the budget presented and approved by the client, and is therefore taken as a "Not to Exceed" dollar amount that the client will pay for the services.

Any changes to the scope requested by the client after this point constitutes a Change Order and will be added to the total project price. Within 5 days after receiving the signed NTE, funding in the amount of the total project cost will be pulled from the client's account (reference section J, p.109 for sample "Withdraw Project Funding" email). Purchase Orders will be written once funds are in place.

### **2.6 Administrative Charges**

There are two standard charge schedules for projects, depending on type and scope:

1. 12% - Typical multi-trade renovation project (Standard, no A/E included):
  - a. This charge will be applied to the total project cost and pulled prior to start of construction with all other project funding. Total project cost includes all PO's, work orders and material costs.
2. 4.5% - Single trade, furniture procurement only, or A/E projects:
  - a. This fee will be used on projects under \$5,000 requiring only one trade (for construction), for projects including only furniture in the scope of work, and on projects requiring architectural and/or engineering services.

Reference section I, p.87 for "Facilities Overview and Fees" memorandum.





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**SECTION D - PROJECT DELIVERY**

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**1.0 DELIVERY METHOD**

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The delivery method of the project does not change the fact that the project must be created and maintained by Facilities staff, which includes the Project Managers, Maintenance personnel and the TMA system. The two possible delivery methods are:

1. In-house: PM works with FM Superintendent, in-house construction crew is dedicated to revenue projects only, and has first right of refusal for all revenue projects
2. JOC or Bid: PM works with outside contractor/vendor

**1.1 In-house projects**

1. Before construction begins a pre-con meeting is coordinated by the PM and attended by the Superintendent and members of the **FACL-FMC-PreCon** email group list (reference section J, p.103-104 for list of members). Meeting generally includes a site visit. Superintendent is responsible for providing a construction schedule to PM for publication to client and outside vendors (i.e. Great Southwest, Intercon, etc.).
2. Procurement of project specific carpet, vinyl composition tile, rubber base, specialty items, and furnishings:
  - a. PM will work with vendor on quotes, request PO's and coordinates delivery with Superintendent.
3. Role of Superintendent and PM during construction:
  - a. Superintendent coordinates all trades (including Telecomm and Datacomm) and requests all work orders or PO's for the various construction trades. PM provides all necessary information regarding the project scope and is kept informed of progress. PM addresses design issues and field decisions if it affects the intended design, scope or budget.
  - b. During construction, superintendent is responsible for:
    - i. Keeping the project on schedule and in budget as per established plans and signed NTE budget
    - ii. Jobsite supervision, coordination and safety (including IAQ notifications)
    - iii. Coordinates all work with all job trades (except Fire & Life Safety, which PM will coordinate)
    - iv. Coordinates all inspections (except for Fire & Life Safety, which PM will coordinate) and provides copies of inspection forms to PM
    - v. Keeps PM informed of all procurement decisions (i.e. What trades are in-house or contracted out)
    - vi. Communication :
      1. Superintendent funnels all communication from trades, scheduling, etc. to the PM and vice-versa
      2. PM funnels all communication from superintendent to the client and vice-versa

- vii. Provide updates to PM on construction progress
- viii. At the beginning of the job, superintendent requests all work orders
- ix. PM provides Superintendent with 3 copies of the construction plans. (more can be provided if needed)
- x. If there are any necessary changes to the drawings during construction PM will re-issue the affected pages of the set, clearly noting the revision date, provide Superintendent with 3 sets, and discard the old drawings.
- xi. A current set of plans is posted by superintendent at all times at the entrance to the jobsite along with other safety information
- xii. Superintendent is responsible for keeping the jobsite secure
- xiii. PM coordinates Fire alarm, sprinkler, smoke detector, extinguisher inspection by the UNT Fire & Life Safety department.
- xiv. Punch list: walk thru with PM. PM will provide punchlist. Superintendent to coordinate completion of remaining work
- xv. Final inspection (PM & Superintendent)

## 1.2 General Contractor/JOC Projects

### 1.2.1 JOC Proposals and Procurement

All proposals must say "Proposal/Statement of Work," must include RS means pricing, and must be numbered in "1 of x" format, even if there is only one page. The PM will fill out the proposal and then send it to the DFMC for approval. Once approved, combine the JOC proposal, HUB Subcontractor form, and Statement of Work into one packet and submit with request for PO to **FACL-FMC-POReqConst** (reference section J, p.103-104 for group members).

### 1.2.2 Pre-construction Meeting

Before construction begins, a pre-construction meeting is held and attended by all parties included in the **FACL-FMC-Precon** email group list (reference section J, p.103-104 for members). Meeting generally includes a site visit. PM should provide the general contractor and all other attendees with the most current version of the **Pre-Con Guidelines** and **Contractor Safety and Work Practices** (reference section I, p.92-95 for samples). The general contractor is responsible for conveying all information therein to all subcontractors working on the job. GC is to provide contractor and subcontractor emergency contact list and project schedule.

### 1.2.3 Bonding Requirements

Any project with a construction amount over \$25,000 requires a payment bond. Any project over \$100,000 requires both a payment and performance bond. Contractors cannot be released to begin work until proof of bonding has been submitted to Facilities Purchasing.

### 1.2.4 Construction Administration

During construction, PM oversees construction, makes regular site visits, coordinates field issues, takes project photos, and requests inspections through FM as required.

## 2.0 MATERIALS/FURNITURE PROCUREMENT

### 2.1 Bid Limits

#### Fiscal Thresholds for Purchase Order Procedures

- |    |                        |   |
|----|------------------------|---|
| 1. | \$1.00 - \$4,999.99:   | Contractor/Vendor of Choice (HUB encouraged)        |
| 2. | \$5,000 - \$24,999.99: | Three quotes via e-mail/fax (Minimum 2 HUBs)        |
| 3. | \$25,000 - \$90,000:   | Formal bid with HUB Contractor(s) Solicitation      |
| 4. | \$90,000 and up:       | Formal bid, HUB Subcontracting Plan <u>REQUIRED</u> |

Thresholds may not apply when product is available via alternative procurement methods, such as cooperative contracts (TCPN, US Communities, E&I, NIPA, TXMAS, etc.), Buy Board, etc. Contact Facilities Purchasing staff for assistance with current purchasing procedures when utilizing one of these methods.

## **2.2 Requesting a PO or P-Card Purchase**

Reference section J, p.112 for template e-mails requesting a purchase order or P-Card purchase. All P-card purchases require a TMA project requisition to capture charges. Purchaser is responsible for creating requisitions in a timely manner.

### **2.2.1 Requesting a PO**

All Request for POs need to include a current quote. If the quote is priced off of a contract it needs to include the contract number clearly printed on the front of the quote. If it is a PO to a JOC, it needs to have the RS Means pricing with page numbers on each page ("1 of x" format) and must be titled "Proposal- Statement of Work." The request must also include contractors HUB Subcontracting Plan (HSP.) Reference section J, p.110-111 for "Request for PO" email templates.

### **2.2.2 P-Card Purchase**

For P-Card Purchase, please adhere to the following guidelines:

- a. Ensure that UNT is never charged tax on any purchase. If you receive a proposal with tax, you will need to contact the vendor and have them revise and resubmit.
- b. Ensure that if vendors charge a credit card surcharge, all charges are included on proposal sent to p-card holder. If charges are not shown, you will need to contact the vendor and have them revise and resubmit.
- c. Ensure that proposals that reference a procurement contract include detailed contract information on the quote. Contract information must be able to be confirmed by PPS online. *Please note that spot purchases under \$5,000 do not require contract information – either provide all of it or none of it, but do not provide partial information.*
- d. Ensure that the vendor is not on Vendor Hold with the state:
  - Visit the state comptroller's website and enter the vendor name
  - When the search results return, print the page to PDF and attach to your request for p-card purchase with the proposal. *If the vendor you have chosen is on hold, you will need to select another vendor.*
- e. If your purchase is for any kind of audiovisual or computer equipment (including televisions) over \$500 in value, you will need to fill out a CIC form and attach it to the request for p-card purchase:
  - Visit the PPS website to obtain the CIC form and fill out as much of the form as possible, excluding portions required to be filled out by PPS or the p-card holder

## **2.3 Open ("Blanket") Purchase Orders**

When utilizing an open ("blanket") purchase order to procure goods or services, a proposal for goods/services must be sent to Facilities Purchasing in advance to confirm that funding is available. Once funds have been earmarked, proceed with procurement.

Upon receipt of invoices for services rendered or goods delivered, ensure that invoice has been marked to include in the routing process all necessary parties so that a work order can be created to capture charges. Reference section H, p.79 for a sample Invoice Routing Sheet.

### 3.0 WORK ORDERS

For In-House projects, superintendent is responsible for requesting all WO's. For JOC projects, PM will create all project work orders themselves.





#### 3.1 Updating project information:

The screenshot shows a 'Projects' window with the following fields and values:

- Project #:** 11198
- Type:** FMC Project
- Date Requested:** 10/06/2009
- Fund Type:** (empty)
- Repair Ctr.:** FF
- Fiscal Year:** 10
- Account #:** F80099-NT752
- Start Date:** 12/04/2009
- Name:** Willis 222 remodel office for new dean
- Due Date:** (empty)
- Project Manager:** 10009267 Tessa Ryles
- Completed:** (empty)
- Building:** LIBR Willis Library
- Closed:** (empty)
- Dept Id:** F80099 - LO FACILITIES CLEARING ACCOUNT
- Warranty Exp:** (empty)
- Contractor:** (empty)
- Status:** 10/6: PM assigned
- E-mail Address:** (empty)
- Buttons:** Estimate, Linked Documents, Model Records, Other Functions
- Requester:** Lou Ann Bradley
- Requester Ph.:** 2415
- Site:** (empty)
- Bid #:** (empty)
- Parent Tag #:** (empty)
- Supervisor:** (empty)
- Priority:** (empty)
- System:** (empty)
- Sub-system:** (empty)
- Tabs:** Identity, Description, Comments

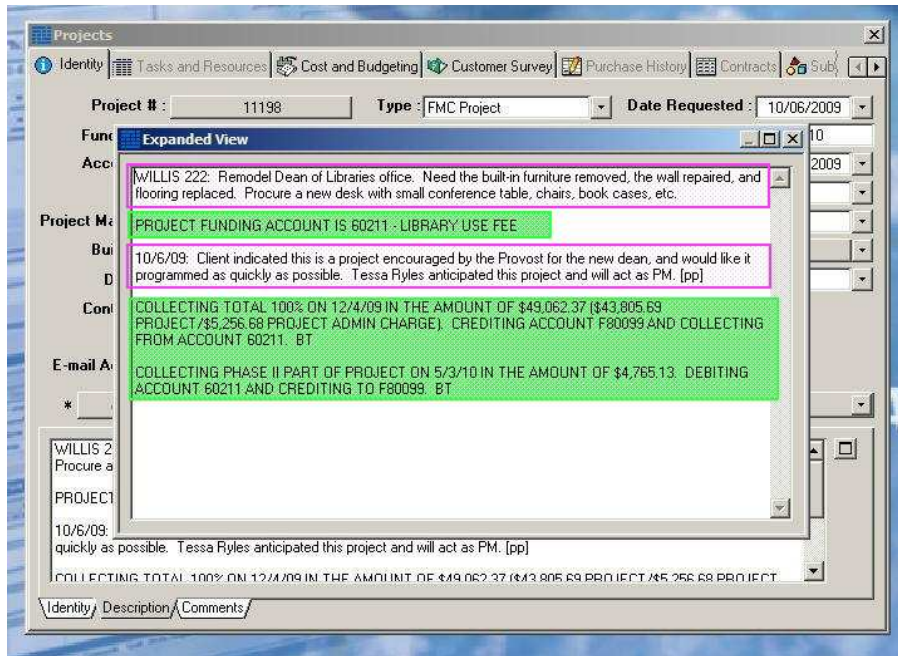
PINK	Items to be changed to project-specific information
ORANGE	Items to be changed to specific, pre-set values
BLUE	Data entered should be one of the two Facilities clearing account numbers

#### Reminders:

- The Account number and the Dept Id are **ALWAYS** the same (one of the clearing account numbers)
- The start date **MUST** be the same as the Estimate's estimated start date (Click on  to find estimated start date.)
- Estimate's actual start date stays the same- **DO NOT CHANGE**- this date tells Peter that the Director of Facilities Business Services has collected the funds.
-  can be changed to **Campus** if needed.
-  tab is modified to show critical updates. Contents of this tab are PUBLIC. Use  tab for internal correspondence.



### 3.2 Updating project description (as needed):



PINK	Examples of type of information to be updated by PM
GREEN	Information to be entered by Business Services

### 3.3 Creating a Work Order:

A single Project can have multiple Tasks. By setting up the Tasks prior to issuing Work Orders, you can visualize each stage of the Project. You can also view defined Tasks for a Project in a Gantt chart. The Task and Resources Tab Project record displays the activities for the current Project. Activity dates are set up to display any conflicts for dependent activities. If a conflict exists, the list is displayed in red as a visual cue that a problem exists.

#### 3.3.1 Creating a Task

- a. Go to **Transactions** at the top left of the TMA screen and select **Project**, then **Records**, then open the **Tasks & Resources** tab.
- b. Click **Add** at the top left of the TMA screen
- c. Type in the task name. A maximum of 35 characters is allowed.
- d. Choose a task type – most are always **Critical**
- e. Enter a description of the task. This is a 2,000 character text field.
- f. Click on **Work Order Info** tab at bottom of project page.
  - It's best to write down the room number(s) of areas to be affected by work order
  - Enter the clearing account number into the **Dept Id** field
  - Tasks that do not need a work order can be entered to show as a step in the process and to show up on the Gantt chart
- g. Enter 600 under **Task Code**; click on drop-down and select **Construction Crew Tech**
- h. Click **OK** on the top toolbar to save the record
- i. Click the red **X** on the right-hand corner of the **Project Task** to be redirected to the **Project** file

#### Reminders:

- Leave dates blank if not using Gantt chart
- All front-end tasks that need to be done prior to funding withdrawal (asbestos) should **leave account number blank**
- **Area** should always be the room number(s)
- **Project** is always 09

#### 3.3.2 Converting Tasks to Work Orders


- a. Locate the Project you wish to modify by clicking **Find** at the top toolbar. Click on the **Project #** field, enter the TMA number, and click **OK** on the top toolbar. (Shortcut: typing CTRL+F will allow you to click on the field you wish to enter query information, and hitting ENTER will call up the record)
- b. Click the **Tasks & Resources** tab
- c. Right-click the **Task** you wish to convert to a **Work Order**. You will be asked if you really want to convert the task to a work order; select **Yes**. A work order number will appear in the **Work Order** column of the **Task** after you select **Yes**
- d. Right-click the **Task** and choose **View Work Order** to be redirected to the work order record

#### Reminders:

- Always check to make sure your task has been properly converted by clicking to view the WO outside of the project
- A work order **MUST** be a task first, but a task does not have to be a work order

#### 3.4 Linking Documents:



- a. Click on the  button and select **Add** in the top left corner of the TMA screen
- b. **Name** the document you are linking as you want it to appear in the list
- c. Delete the default **Path** and link to the document by opening Windows Explorer and copy/pasting the path (you are able to link to a specific document or an entire folder)
- d. Change **Type** to whatever category best fits the description of your file
- e. Click **OK** when finished at the top middle of the TMA screen



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SECTION E - PROJECT IMPLEMENTATION

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**1.0 CONSTRUCTION ADMINISTRATION**

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**1.1 Contractor Safety and Work Practices**

Reference section I, p.94-95.

**1.2 Invoicing**

Please follow the process outlined below for invoicing:

1. Check the invoice against the original proposal and purchase order.
  - a. If the amounts match, skip to step 2.
  - b. If the amount is different, check each line item of the invoice against the original PO to determine where the difference stems from. If processing invoices that will be billed in multiple phases, it is sometimes helpful to use a different colored pen for each invoice and mark which line items were paid for by the corresponding invoice.
  - c. Confirm that the vendor will be submitting additional invoices for any obvious differences- if so, reference step 2 below.
  - d. If the difference is not obvious, make a note on a post-it and return the invoice to the PM indicating what the total cost difference is so they can contact the vendor to investigate further.
2. Fill out Contract Completion Form.
  - a. Reference section J, p.78 for sample "Contract Completion Form." Form should be as complete as possible prior to submitting for PM review/signature.
  - b. If the invoice amount matches the purchase order total, check the "Work completed as specified" box.
  - c. If the invoice is a partial bill, check the "Work is not complete" box and in the Comments section, note that "additional invoices are pending."
3. Fill out Invoice Routing Sheet.
  - a. Fill out the project name and vendor name. PM will check appropriate parties to be included in the routing process.
4. Note the PO.
  - a. Make a note at the bottom of the PO indicating the invoice number, date processed, amount invoiced, and if partial invoicing occurs, note remainder to be billed in parentheses.
5. Submit to the PM for review and signature.
6. Add scan of signed invoice to PDF containing PO and original quote. Reference section F 1.2, p. 30-31 for proper naming conventions.

**1.3 Inspections**

Reference section H, p.80-81 for a sample Construction Inspection Report.

**1.4 As-Built Drawings**

**1.4.1 In-House Projects and General Contractor/JOC Projects**

Reference section F 1.4, p.32 for as-built procedures.

#### 1.4.2 Projects with A/E Services

In the event that an architect or engineer is employed for a project, General Contractor notes any changes from the original design on the plans. The revised plan is submitted to the architect or engineer at the end of the project. The architect or engineer updates the CAD drawings to reflect the as-built conditions and submits the CAD file to the PM. The PM then submits the new drawing(s) to the CAD Manager to be incorporated into the UNT electronic record drawing file.

### 2.0 **FURNITURE INSTALLATION / MOVE COORDINATION**

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#### 2.1 Furniture Standards and Performance Guidelines

When assisting departments on campus with furniture procurement, Facilities Management & Construction makes selections based on a number of factors: industry standards, availability of products (including flexibility/breadth of line and cooperative contracts), previous experience (with both manufacturer and dealership), and applicable warranty information. Reference section I, p.98-99.

#### 2.2 Delivery and Installation Guidelines

In order to ensure premium customer service, Facilities has developed guidelines for the delivery and installation of furnishings. The guidelines detail Facilities' expectations of outside vendors and dealerships that prohibit deliveries from being made without proper notification and coordination with the end user. Reference section I, p.100.

#### 2.3 Move Coordination

Coordination of intercampus relocations requires facilitation between multiple departments on campus, including but not limited to the following:

1. UNT Telecomm
2. UNT Datacomm
3. Network Support (contact the end user to identify their Network Support Manager)
4. UNT Access Control
5. UNT Moving & Hauling (or outside contractor, if applicable)

Tools utilized to aid in this effort include the standard Move Matrix spreadsheet (reference section H, p.69 for sample) and a memorandum with helpful suggestions (reference section I, p.101-102) for end users to follow in preparation of their move.

##### 2.3.1 Move Preparation

Reference section I, p.101-102 for a memorandum with helpful suggestions for the end user to review in preparation of their relocation.

### 3.0 **CLOSE OUT**

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1. Upon move-in, the PM provides the end user with a Certificate of Occupancy (reference section H, p.82) for signature.
2. PM sends Room Number Change email notification (reference section J, p.116) to **FACL-FMC-RoomChange** email group list (reference section J, p.103-104 for list of members)
3. When project is 100% complete, PM requests that project to be closed. (PM e-mail to either **FACL-FMC-FinalConstr** or **FACL-FMC-FinalJOCFurn**, depending on project scope). Reference section J, p.114 – 115 for sample "Final Completion" email.
4. Director of Facilities Business Services will supply a reconciliation of the project financials to the PM.
5. Ensure all IDIQ documentation is complete where applicable.

6. PM sends end user a Customer Service Survey to fill out and return (reference section H, p.81 for blank survey and section J, p.117 for sample email.)
7. PM to file completed Certificate of Occupancy and Customer Service Survey in paper file, network file, and link to TMA Project. (Reference section F.1.2, p. 30-31 for proper file naming conventions.)
8. PM sends finish plan to Keith Cook to record in TMA Area Records Log.
9. PM will coordinate collection of all files from Facilities Maintenance and Business Services and combine into one master file at the end of the project for archiving

#### **4.0 RECORD KEEPING**

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Project Manager is responsible for keeping hard copy documentation of important project information in the project file. For example (the following list may not be comprehensive):

1. PIW form, and Project initiation documentation for TMA
2. Project estimate(s)
3. Approval(s) of client
4. Any correspondence relating to the project (i.e. account authorization, time frame, finish selections, etc.)
5. Drawings, specifications, plans, as-builts, finishes selections and furnishings
6. Submittals
7. Inspection documentation
8. Quotes, bids, bidders list and contracts
9. Copy of Purchase Order, invoices and receipts for expenditures
10. P-Card transactions
11. Fax communications with sent/received status sheets attached.





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SECTION F - NETWORK DIRECTORY AND CAD STANDARDS

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1.0 **PROJECT DIRECTORY SET-UP**

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1.1 **Setting Up Network Project Files**

1. Create the project file by copy/pasting the Template:
  - a. Locate the appropriate Building file:
    - i. If there is not a Floor folder already within the Building file, copy the Floor folder from the Template
    - ii. If there is already a Floor folder within the Building file, only copy the "10xxx" folder
  - b. **Do not copy any project files that already existing with the Building folder.** The Template folder will always be most current (new forms will be added only to the Template, revisions to existing forms will be performed within the Template folder, etc.)
  - c. Once you have pasted a copy of the Template folder into the appropriate building file, rename the folder with the TMA project number and project location. Reference section F 1.2, p.30, "File Naming Conventions" for the correct format.
2. Within your newly created project file, there are five main folders within which you should organize all project documentation – reference section F 1.2, p.30, "File Naming Conventions" for correct format in naming stored files:
  - a. **Approvals** – Store signed drawings, signed budget estimates, client approved estimates, and journal template scans.
  - b. **Correspondence:**
    - i. **Email**
      1. **\*\*\* Request for Funding Withdraw emails should be stored in the main Email folder\*\*\***
      2. **Sent** – Drag/Drop sent emails into folders named by Recipient
      3. **Received** – Drag/Drop received emails into folders named by person we received the email from.
    - ii. **Faxes** – Store scanned copies (PDF files) of received / sent faxes (does not include quotes / proposals / estimates – see subsection iv. "Proposals")
    - iii. **IAQ-Work Permit** – Store scanned copies of paper work permits or drag/drop permits received via email (emailed permits from Risk Management regarding asbestos should be stored in two locations – both in Received Emails AND in the IAQ-Work Permit folder)
    - iv. **Inspections** – Store scanned copies of original completed inspection forms
  - c. **Drawings:**
    - i. **\*\*\* Working CAD file is stored in the main Drawings file\*\*\***
    - ii. **Issued** – Store PDF files of space plans or construction drawings that have been issued to clients, contractors, or vendors
    - iii. **Received** – Store PDF files of space plans or other drawings received (either electronically or hard copies that have been scanned in) from clients, contractors, architects, or vendors
    - iv. **FINAL SUBMITTAL** – Upon completion of project, move working CAD file into FINAL SUBMITTAL folder for CADD Department to perform as-built check and project closeout (includes PDF file of issue set)

- d. **Forms:**
  - i. Note: Current copies of necessary project forms will always be kept in the Template folder
  - ii. Store Meeting minutes, memos, move matrix, and transmittals.
- e. **Images:**
  - i. Store photos from field verification, site checks, and final installations within separate folders (reference section F 1.2 below, "File Naming Conventions", for correct naming format)
- f. **Proposals:**
  - i. **CA (Construction Administration)** – Store all proposals that apply to the construction process (paint, millwork, framing/sheetrocking, etc.,) PO scans, and invoices\*.
  - ii. **FF&E (Furniture Fixtures & Equipment)** – Store all proposals that apply to furniture orders, lighting fixtures, refrigerators, etc.,) PO scans, and invoices\*.
  - iii. **Project Estimates** – Store all versions of Facilities-developed project estimates (for each revision of the estimate, save a copy of the original and rename with the version number so that all previous versions are retained – reference section F 1.2 below, "File Naming Conventions", for correct naming format)  
**\*\*\*When PO's and invoices have been received and/or paid, they should be combined into PDF's that contain (in order):**
    - o PO
    - o Invoices
    - o Original Quote**Then the individual copies can be deleted. (Reference section F 1.2 below for naming conventions.)\*\*\***
- g. **Completed (Past) Projects:** Once a project is completed and all close-out procedures have been performed by the CAD and FIMS departments, the entire folder will be zipped and named using the same naming convention ("10xxx\_[Room/Suite] [Building]").

**1.2 File Naming Conventions**

**Network Project File:** "10xxx\_[Room/Suite] [Building]"  
 Example: 10349\_175 Stovall

**Emails:** Subject and include date sent/received

**Faxes:** "F\_[Room/Suite] [Building] – [Subject]"  
 Example: "F\_175 Stovall – Credit Application"

**IAQ-Work Permit:** "IAQ\_[Room/Suite][Building]"

**Inspections:** "[Inspection Code]\_[Room/Suite][Building]\_[Date]"  
 Example: "C-10\_175 Stovall\_01-22-09"

**Drawings – Active CAD File:** "[Room/Suite] [Building].dwg"

**Drawings – Issued:** "[Date] [Room/Suite] [Building]- [Subject]"  
 Example: "11-17-08 316 Terrill – SS1 to client"

**Drawings – Received:** "[Date] [Room/Suite] [Building]- [Subject]"  
 Example: "09-29-08 316 Terrill – Client Proposed Layout"

**Forms – Memos:** "M\_[Room/Suite] [Building] - [Subject]"



**Forms – Meeting Minutes:** “MM\_[Room/Suite] [Building] – [Subject]”

**Forms – Move Matrix:** “MMX\_[Room/Suite] [Building] – [Subject]”

**Forms – Transmittal:** “T\_[Room/Suite] [Building] – [Subject]”

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**Images - Folders:** “[Date] – [Subject/Phase]”

Example: “08-13-07 – Site Visit”

**Images:** No naming convention applies

---

**Proposals:** “Q\_[Company] – [Description]”

CA Example: “Q\_Essex Woodworking – Breakroom Mlwk”

FF&E Example: “Q\_CEBI – Task Seating”

**PO Packets::** “PO\_xxxxx-Vendor Name”

**Project Estimates:** “E\_[Room/Suite] [Building] [Version]”

Example: “E\_175 Stovall v1”, “E\_175 Stovall v2”, “E\_175 Stovall FINAL”

Client Approved: “E\_[Rm/Ste] [Blgd] [Version]-Approved”

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#### 1.2.1 Network Project Filing Do’s and Don’ts

- Do** Follow established naming conventions for consistency and ease in locating documentation for future projects
- Do** Drag/drop emails into the network file on a regular basis to stay caught up
- Do** Be sure to replace old versions of quotes with the most current version – keeping outdated documentation creates confusion later
- Do** Keep every copy of project estimates that have been developed – often times, the first version is the one that is approved in the end
- Do** Make sure to reference the version number in the footer of each project estimate developed so that clients can reference specific versions when negotiating
- Don’t** File every email within an exchange – only file the final email (which contains the entire thread)
- Don’t** Copy established project files within the Building folder – always copy from the Template folder
- Don’t** Create your own file naming system – if you’re unsure of how something should be filed or named, just ask
- Don’t** Create a new copy of the working CAD file for every new space plan – there should only be ONE working CAD drawing in the project file (if there are multiple space plans, they should all be drawn within the same file using individual tabs/titleblocks for each)

### 1.3 Filing Process for Paper Project Files

1. **PIW / TMA / Work Orders:** Certificate of Occupancy, Customer Service Survey, PIW TMA form (from Gail,) Project Checklist, PIW (from client,) Close-Out Checklist.
2. **Programming:** Includes field verification, space planning, meeting notes, and all other programming information leading up to the point when the client signs off on an approved layout (including the actual signed floor plan)
3. **Accounting:** Project estimates, signed/approved client estimate, funding withdrawal, POs, construction proposals, and associated invoices
4. **Correspondence:** Emails, meeting minutes (not programming related), submittals, RFI's, hard copies of faxes, SAC approval, work permits, inspection forms, etc.
5. **[Blank] – (FF&E):** Furniture cut sheets, finish samples (in a labeled manilla envelope), furniture proposals, furniture POs, and associated invoices
6. **Plans/Drawings:** Construction drawings, millwork shop drawings, etc.

#### 1.3.1 Paper Project Filing Do's and Don'ts

- Do** Punch and file documentation as you put it in the folder – don't leave it in the file loose
- Do** Attach proposals/quotes and paid invoices to the corresponding PO
- Do** Keep hard copies of important emails in the paper file, but file the rest electronically in the network file
- Do** Keep all original meeting minutes, space plans, and field checks
- Do** Make sure to label and number all estimates and space plans appropriately
- Don't** Keep outdated quotes/proposals – only keep what is actually implemented
- Don't** Keep old redlines – once the redlines have been picked up to the PM's satisfaction, recycle the outdated sets
- Don't** Create your own file system – if you're unsure of where something should be filed, just ask

### 1.4 Network Project File Close Out Process

1. Ensure that the CAD file has been moved into the FINAL SUBMITTAL folder
2. Ensure that the final version of the move matrix that was implemented is the only version in the file under the Forms tab
3. Ensure that all project-related emails have been filed electronically in the network project folder
4. Ensure that the space plan that was implemented has been moved back into place on the floor plate within the CAD file (reference section F 2.6, p.42, CAD Standards- "Drawing Standards.")
5. Upon submission of Final Completion email (reference section J, p.114-115 for sample email), the CAD department will initiate as-built check and FIMS will commence with data entry of project information into CAFM system. Once as-built check is complete, the CAD Manager will zip the entire project folder, and move it into the appropriate "Completed (Past) Projects" file.

### 2.0 CAD STANDARDS

Reference section F, p.33-43 for complete CAD Standards. If you have been issued a version of the manual that does not contain section F, p.33-43 and a copy is needed, contact the Director of Facilities Management and Construction.



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- 2.1 Layers List
- 2.2 Block List
- 2.3 Symbols Library
- 2.4 Converting a New Drawing
- 2.5 Importing FM&C Interiors Titleblock Templates
- 2.6 Drawing Standards
- 2.7 AutoCAD Command Aliases

## 2.1 Layers List

Use the following list of approved layers when converting an existing drawing for a new project.

DO NOT CREATE NEW LAYERS. If you have questions about what belongs on which layers, consult a Project Manager for assistance.










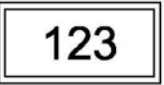
0			w... CONTL...	—	Default	Colo...		
A-Anno-Keyn			w... CONTL...	—	Default	Colo...		Annotation Key Note
A-Anno-Nplt			r... CONTL...	—	Default	Colo...		
A-Anno-Stamp			r... CONTL...	—	Default	Colo...		Annotation Stamp - Not For Construction
A-Anno-Text			w... CONTL...	—	Default	Colo...		
A-Anno-Ttlb			w... CONTL...	—	Default	Colo...		Annotation Title Block
A-Area			c... CONTL...	—	Default	Colo...		
A-Area-Iden			w... CONTL...	—	Default	Colo...		
A-Area-Patt			w... CONTL...	—	Default	Colo...		
A-Area-Type			w... CONTL...	—	Default	Colo...		
A-Dim-Exst			8 CONTL...	—	Default	Colo...		Existing Dimensions
A-Door-Exst			w... CONTL...	—	0.13 mm	Colo...		Existing doors to remain
A-Eqpm			r... CONTL...	—	0.13 mm	Colo...		Existing Equipment to Remain
A-Fire-Exst			r... CONTL...	—	Default	Colo...		Existing Fire System to Remain
A-Glaz-Exst			1... CONTL...	—	Default	Colo...		Existing Glass or Glazing to Remain
A-Mlwk-Exst			37 CONTL...	—	0.13 mm	Colo...		Existing Millwork to Remain
A-Rmno-Iden-Ex...			w... CONTL...	—	Default	Colo...		Tags for Existing Rooms
A-Rmno-Iden-N...			w... CONTL...	—	Default	Colo...		Tags for New Rooms Added
A-Wall-Exst			g... CONTL...	—	Default	Colo...		Existing Partitions to Remain
A0-Demo-Door			8 DASH...	—	Default	Colo...		Existing Doors to be Demolished
A0-Demo-Fire			8 DASH...	—	Default	Colo...		Existing Fire System _Alarms to be Demolished
A0-Demo-Glaz			8 DASH...	—	Default	Colo...		Existing Glass or Glazing to be Demolished
A0-Demo-Grid			8 DASH...	—	Default	Colo...		Existing Ceiling Grid to be Demolished
A0-Demo-Hvac			8 DASH...	—	Default	Colo...		Existing Mechanical _HVAC to be Demolished
A0-Demo-Lite			8 DASH...	—	Default	Colo...		Existing Light Fixture to be Demolished
A0-Demo-Mlwk			8 DASH...	—	Default	Colo...		Existing Millwork to be Demolished
A0-Demo-PFix			8 DASH...	—	Default	Colo...		Existing Plumbing Fixtures to be Demolished
A0-Demo-Powr			8 DASH...	—	Default	Colo...		Existing Power _Data to be Demolished
A0-Demo-Tptn			1... CONTL...	—	Default	Colo...		Demo Toilet Partition. Grab Bar
A0-Demo-Wall			8 DASH...	—	Default	Colo...		Existing Walls to be Demolished
A0-Dims			8 CONTL...	—	Default	Colo...		Dimensions for Areas to be Demolished
A1-Dims			8 CONTL...	—	Default	Colo...		Dimensions for New Partitions and Openings
A1-Door-Neww			r... CONTL...	—	0.20 mm	Colo...		New Doors
A1-Door-Relo			m... DASH...	—	0.09 mm	Colo...		Existing Doors to be Relocated
A1-Fire-Neww			r... CONTL...	—	0.09 mm	Colo...		New Rated Fire Partitions
A1-Glaz-Neww			1... CONTL...	—	Default	Colo...		New Glass or Glazing
A1-Mlwk-Neww			30 CONTL...	—	Default	Colo...		New Millwork
A1-Mlwk-Relo			m... DASH...	—	Default	Colo...		Existing Millwork to be Relocated
A1-PFix-Neww			c... DASH...	—	0.05 mm	Colo...		New Plumbing Fixture
A1-Tptn-Neww			1... CONTL...	—	Default	Colo...		New Toilet Partition/ Grab Bar
A1-Wall-Neww			b... CONTL...	—	0.25 mm	Colo...		New Partitions to be Constructed
A1-Wall-Patt			y... CONTL...	—	0.00 mm	Colo...		Poche for New Partitions
A2-Dims			8 CONTL...	—	Default	Colo...		Dimensions for Power _Data
A2-Powr-Exst			8 CONTL...	—	0.00 mm	Colo...		Existing Power _Data to Remain
A2-Powr-Neww			r... CONTL...	—	0.20 mm	Colo...		New Power _Data
A2-Powr-Relo			m... DASH...	—	0.09 mm	Colo...		Existing Power _Data to be Relocated
A3-Clng-Head			8 CONTL...	—	Default	Colo...		Door Header
A3-Fire-Exst			8 CONTL...	—	Default	Colo...		Existing Fire Alarms to Remain
A3-Fire-Neww			r... CONTL...	—	Default	Colo...		New Fire Alarms

(Layers List Cont.)

	A3-Fire-Relo				m... DASH...	——	Default	Colo...			Existing Fire Alarms to be Relocated
	A3-Grid-Exst				8 CONTI...	——	0.05 mm	Colo...			Existing Ceiling Grid to Remain
	A3-Grid-Neww				w... CONTI...	——	0.09 mm	Colo...			New Ceiling Grid
	A3-Hvac-Exst				8 CONTI...	——	Default	Colo...			Existing Mechanical _HVAC to Remain
	A3-Hvac-Neww				r... CONTI...	——	Default	Colo...			New Mechanical _HVAC System
	A3-Hvac-Relo				m... DASH...	——	Default	Colo...			Existing Mechanical _HVAC to be Relocated
	A3-Lite-Exst				8 CONTI...	——	0.05 mm	Colo...			Existing Light Fixtures to Remain
	A3-Lite-Neww				r... CONTI...	——	0.20 mm	Colo...			New Light Fixtures
	A3-Lite-Relo				m... DASH...	——	0.09 mm	Colo...			Existing Light Fixtures to be Relocated
	A4-Dims				8 CONTI...	——	Default	Colo...			Finish Dimensions
	A4-Patt				w... CONTI...	——	Default	Colo...			Finish Patterns
	A5-Dims				8 CONTI...	——	Default	Colo...			Dimensions for Furniture Plan
	A5-Furn-Exst				8 CONTI...	——	0.05 mm	Colo...			Existing Furniture to Remain
	A5-Furn-Prop				m... CONTI...	——	0.09 mm	Colo...			Proposed or New Furniture
	A6-Detail				w... CONTI...	——	Default	Colo...			Plan Details
	A6-Elev				w... CONTI...	——	Default	Colo...			Plan Elevations
	B-Base				b... CONTI...	——	0.25 mm	Colo...			Core/ Shell
	B-Belo				40 CONTI...	——	0.13 mm	Colo...			Elevator shafts/Stairwells
	B-Cols				b... CONTI...	——	0.25 mm	Colo...			Existing Building Columns
	B-Glaz				b... CONTI...	——	0.15 mm	Colo...			Shell/ Exterior Windows
	B-Hatch				2... CONTI...	——	Default	Colo...			Existing Building Hatch for Walls
	B-Pfix				1... CONTI...	——	0.15 mm	Colo...			Existing Building Plumbing Fixtures
	B-Roof				2... CONTI...	——	Default	Colo...			Existing Building Roof
	B-Tptn				1... CONTI...	——	Default	Colo...			Toilet Partitions/ Grab Bars
	C-Pkng				2... CONTI...	——	Default	Colo...			Area designated for Vehicle Parking
	C-Pkng-Isld				2... CONTI...	——	Default	Colo...			Parking Island _Wheel Stops
	C-Pkng-Strp				2... CONTI...	——	Default	Colo...			Parking Stripes
	C-Rail				w... TRACKS	——	Default	Colo...			Railway _Train Tracks
	C-Road				w... CONTI...	——	Default	Colo...			Roadways and Drives
	C-Road-Curb				2... CONTI...	——	Default	Colo...			Back of Curbs for Roadways
	DEFPOINTS				40 CONTI...	——	Default	Colo...			
	L-Bike				w... CONTI...	——	Default	Colo...			Bike Racks
	L-Fence				2... FENCE...	——	Default	Colo...			Fence or Barriers
	L-Irrg				1... DASH...	——	Default	Colo...			Landscape Irrigation
	L-Plnt				65 CONTI...	——	Default	Colo...			Landscape, Plants, or Trees
	L-Pond				1... CONTI...	——	Default	Colo...			Ponds, Lakes, or Waterways
	L-Sprt				37 CONTI...	——	Default	Colo...			Sport or Athletic Fields
	L-Walk				54 CONTI...	——	Default	Colo...			Sidewalks
	L-Wall				8 CONTI...	——	Default	Colo...			Retaining Walls
	Layer1				w... CONTI...	——	Default	Colo...			Default AutoCAD Layer (Standard)
	NICN				30 CONTI...	——	Default	Colo...			Not In Contract Layer
	NOPLOT				r... CONTI...	——	Default	Colo...			No Plot Layer
	RM-Aed				r... CONTI...	——	Default	Colo...			Risk Management- AED
	RM-Lnd				w... CONTI...	——	Default	Colo...			Legend
	RM-Refg				r... CONTI...	——	Default	Colo...			Area of Refuge
	RM-Route				r... CONTI...	——	Default	Colo...			Risk Management- Exit Route
	RM-Torn				30 CONTI...	——	Default	Colo...			Tornado Shelter Area
	Symbol Library				w... CONTI...	——	Default	Colo...			

## 2.2 Block List

Below is a list of blocks created for insertion in paperspace:

















	<p><b>Empty Keynote Bubble</b> Import this block in paperspace and center over number(s) in the notes section of your titleblock.</p>
	<p><b>Single Keynote Bubble</b> Import this block in paperspace and locate above viewport over areas of floor plan requiring keynote(s). Mirror for proper direction; contains editable attribute.</p>
	<p><b>Double Keynote Bubble</b> Import this block in paperspace and locate above viewport over areas of floor plan requiring keynote(s). Mirror for proper direction; contains editable attribute.</p>
	<p><b>All Keynote Bubble</b> Import this block in paperspace and locate above viewport over areas of floor plan requiring keynote(s). Contains editable attribute.</p>
	<p><b>Door / Hardware Type Symbol</b> Import this block in paperspace and locate above viewport over all doors within scope of project. Contains editable attributes for both door type and hardware type.</p>
	<p><b>Elevation Symbol</b> Import this block in paperspace and locate above viewport to indicate areas where an elevation has been provided later in the set of drawings. Contains editable attribute to reference where elevation can be located.</p>
	<p><b>Flooring Change Symbol</b> Import this block in paperspace and locate at any area where flooring types transition. Contains editable attribute.</p>
	<p><b>Accent Paint Symbol</b> Import this block in paperspace and locate at any area where there will be an accent paint color, using p-lines to indicate stopping points. Contains editable attribute.</p>
	<p><b>Finish Symbol</b> Import this block in paperspace and locate within each space containing a room number to indicate individual finishes for that area. Should be multiple finish symbols per room indicating flooring type, base type, paint color, etc. Contains editable attributes for finish type and finish number (should correspond with Finish Schedule).</p>
	<p><b>Room Number Symbol</b> Versions of the room number block exist for insertion in both paperspace and model space – be sure you select the correct block or the scale will be incorrect. Contains editable attribute.</p>

## 2.3 Symbols Library

Below is a list of symbols provided in the Master Template for use in all drawings. **DO NOT CREATE YOUR OWN SYMBOLS**; use those provided within the library. If a symbol does not exist for a specific circumstance within a project drawing that you are working on, please notify a Project Manager for assistance. Some blocks contain invisible attributes that cannot be seen on the drawing. The invisible attributes can be extracted into a spread sheet for tracking.




















### 2.3.1 POWER AND DATA LEGEND

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	ISOLATED
	QUAD
	DEDICATED
	DUPLEX
	JUNCTION BOX
	POWER OUTLET FLOOR MOUNTED
	TELE/DATA FLOOR MOUNTED
	TELE/DATA
	PHONE
	DATA
	FIRE ALARM AUDIO/VISUAL DEVICE MOUNTED PER ADA REQUIREMENTS
	ALARM
	STROBE
	COAX CABLE
	BL 24" BLANK
	RACEWAY

### 2.3.2 RCP LEGEND

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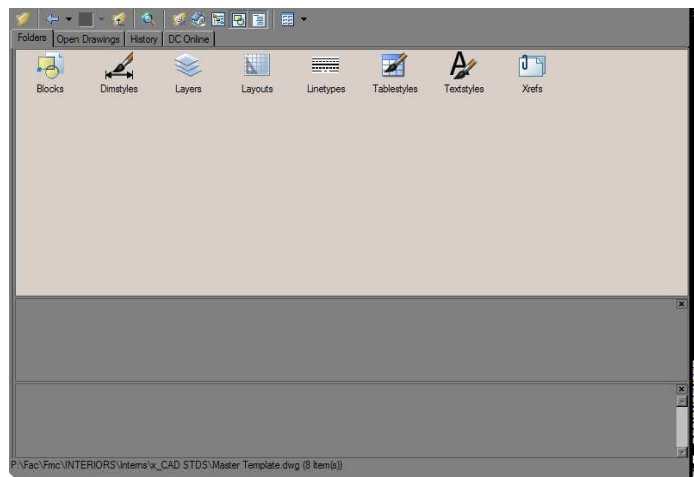
	EXISTING FLUORESCENT FIXTURE
	EXISTING FLUORESCENT FIXTURE TO BE RELOCATED (OR DEMOLISHED) AS NOTED
	EXISTING RELOCATED FLUORESCENT FIXTURE
	NEW FLUORESCENT FIXTURE TO MATCH EXISTING
	RECESSED CAN LIGHT
	TRACK LIGHTING SYSTEM
	EMERGENCY LIGHT
	EXIT LIGHT WITH EMERGENCY LIGHT
	EXIT LIGHT WALL MOUNT
	EXIT LIGHT (# OF FACES AND DIRECTION OF CHEVRONS AS INDICATED)
	HVAC SUPPLY
	EXISTING HVAC SUPPLY TO BE RELOCATED (OR DEMOLISHED) AS NOTED
	EXISTING HVAC SUPPLY TO BE RELOCATED (OR DEMOLISHED) AS NOTED
	EXISTING HVAC RETURN
	EXISTING HVAC RETURN TO BE RELOCATED (OR DEMOLISHED) AS NOTED
	EXISTING RELOCATED HVAC
	DIMMER SWITCH
	NEW SWITCH
	SPRINKLER HEADS

## 2.4 Converting a New Drawing

**STEP ONE:** Open [P:\Fac\Fmc\Cadd\RECORD FILES](#) and open the record drawing for the building/floor where your new project is located. Using **Save As**, save a copy of the record drawing into the project folder from which you will be actively working.

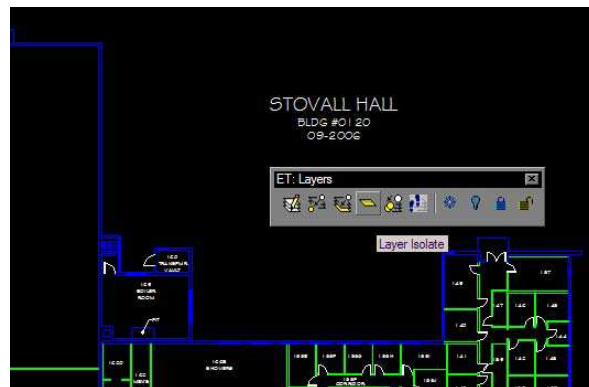
**STEP TWO:** Once you have opened your copy of the record drawing (or your “active drawing”) that you’ll be working from, go to File/Open and navigate to [P:\Fac\Fmc\\\_CAD STDS](#) and select the CAD file titled “Master Template.dwg”. You will keep this file open for the entire conversion process.

**STEP THREE:** Within your active drawing, open Design Center and select the tab at the top left that says “Open Drawings”. Double-click the file titled “Master Template” and then select the “Folders” tab. You will see the following:



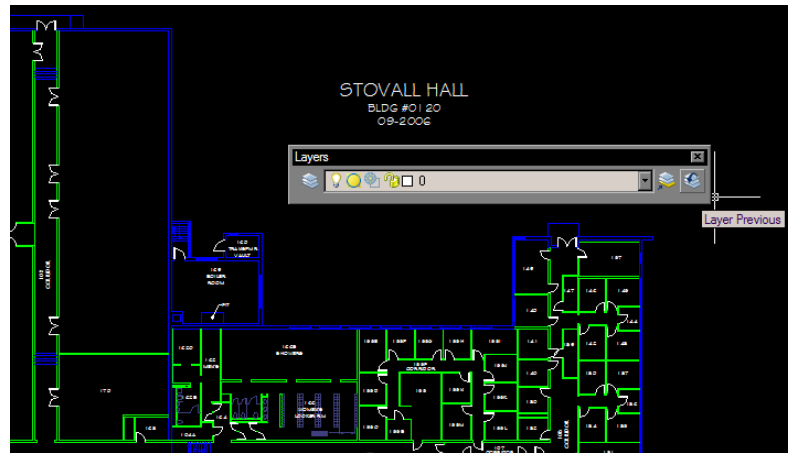
Double-click on the Layers icon. Once you see the complete master list of layers, select all icons, then drag and drop into your active drawing. This will import the master layers into your active drawing.

**STEP FOUR:** Begin converting all old layers in your active drawing to the new, master layer list by isolating and changing layers individually. To isolate a layer, click on the **Layer Isolate** icon (on the **Express Tools: Layers** toolbar).



As you convert a layer and move on to the next one, you’ll need to press the **Layer Previous** icon (on your **Layers Toolbar**) to return to the previous view.





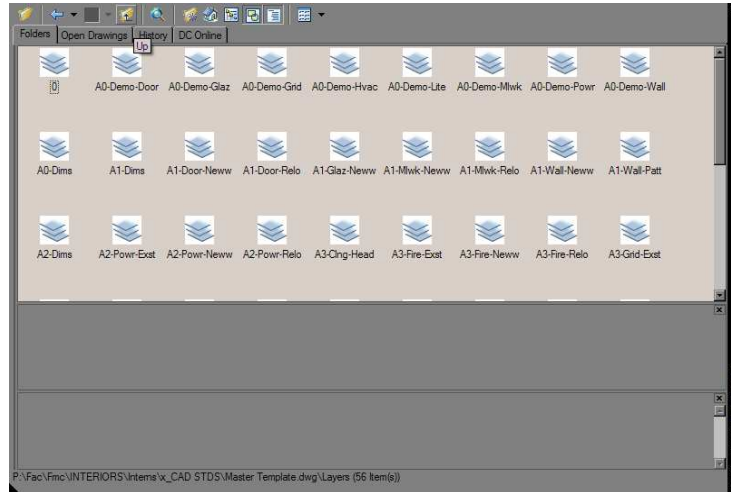
STEP FIVE: Once you have successfully converted all old layers to the new Master layer scheme, you will need to purge all old layers and blocks to clean the drawing. Type “purge” in the command line to initiate the Purge dialog box.



Select “Purge All” and then click “Yes to All”. You will need to repeat this step multiple times until the “Purge All” button is greyed out.

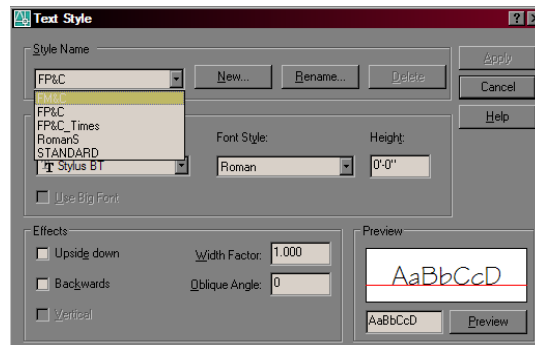
Once you have purged all unused layers, blocks, etc., you will need to open Layer Manager to ensure that the only layers remaining correspond to the Master layer scheme. Occasionally, layers will remain that you cannot purge or delete, even if you cannot find anything that is still left on that layer. Please notify a Project Manager so they can reconcile any remaining old layers.

STEP SIX: Once no old layers remain, you will need to open Design Center and by pressing the Up button to return to the main folder list:



At the main folder list, double-click the Text Styles icon and drag/drop text style "FM&C" into your active drawing. Isolate any text within your drawing and convert the text style to FM&C. Once all text is converted, repeat Step Five.

After purging is complete, go to Format/Text Style and remove all text styles but "FM&C" and "Standard" by selecting each from the drop down and clicking Delete.



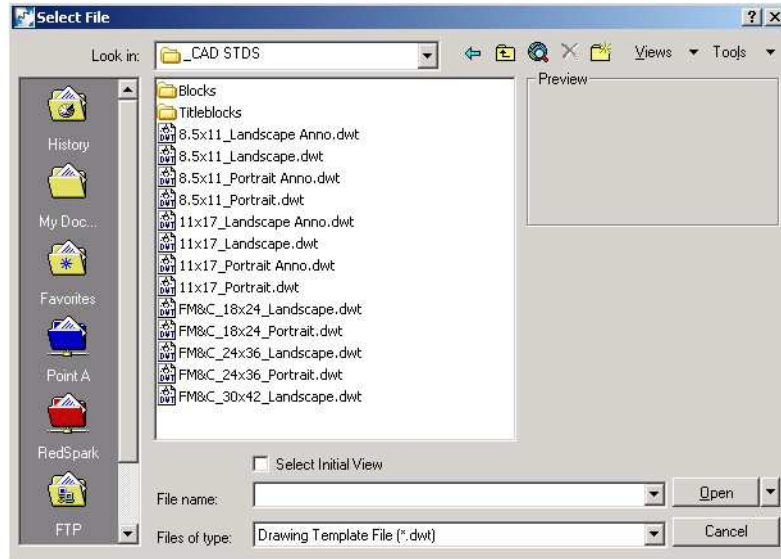
Notify a Project Manager if any text styles cannot be deleted.

STEP SEVEN: Return to the main folder list in Design Center and double-click on the Dimstyles icon. Drag/drop dimension styles "FM&C14" and "FM&C18" into your active drawing.

**Drawing conversion is complete when layers listed in Layer Manager match those in the Master Template, the only text styles within the active drawing are "FM&C" and "Standard", and the only dimension styles are "FM&C14", "FM&C18", and "Standard".**

## 2.5 Importing FM&C Interiors Titleblock Templates

STEP ONE: Position your cursor over one of the tabs at the bottom of the screen – doesn't matter which one, although there should only be two (Model and Layout1). Right click and select "From Template" from the menu. Navigate to P:\Fac\Fmc\CAD STDS and after determining the appropriate size/layout for your project, first import the template file ending with "...ANNO.dwt". This is your annotation, or title, page for your drawing set.



Once you have imported the annotation template, repeat the steps to import the corresponding template for the remainder of the drawing set.

STEP TWO: Rename your tabs accordingly (AN, Ao, A1, A2, A3, A4, A5, A6, etc.) and then update all titleblock text to include specific project details. Edit all text FIRST on both the AN tab and the Ao tab, and THEN create the appropriate number of copies of the Ao so that all you have to modify on subsequent sheets is the sheet title and sheet number.

To create a copy, right click above the tab you want to make a copy of, and select "Move or Copy" from the menu. Then highlight "(move to end)" and check the box next to "Create a Copy" at the bottom of the dialog box. Click OK. Repeat as many times as necessary to complete your set.

STEP THREE: Set up your Annotation page by copy/clipping the symbol library into the model space of your active drawing. Then in paperspace on your Anno sheet, create viewports for each legend. Upon issuing the set of construction documents, you can delete any unused symbols from the legends prior to handing the set off to the contractor.

**ALL VIEWPORTS ON ANNOTATION SHEET SHOULD BE SET TO 1/8" SCALE.**

1/8" scale is the preferred scale for most drawings, but 1/4" or 1/2" can be used if necessary (for elevations, details, or projects with a smaller area of scope). At the beginning of the project, decide which scale is most appropriate for the size of the project ("size" you will be plotting), then dimension using the correlating dimscales. FM&C18 = 1/8", FM&C14 = 1/4", and FM&C12 = 1/2".

## 2.6 Drawing Standards

Following is a list of standards that need to be followed when preparing a set of construction documents. It is imperative for the sake of efficiency that all drawings be created and maintained in a consistent manner.

- P-LINES:** When drawing single entities such as doors or pieces of furniture, these should be drawn using the rectangle command or using p-lines. This eliminates random lines floating about in model space and makes it easier and faster to select those entities quickly.
- EXPLODE:** Do not use the explode tool. Ever.
- LAYER MANAGEMENT:** Use only the layers listed in the Master template. If you are unsure of what layer a CAD entity should be placed on, check with one of the Project Managers. If a new layer needs to be assigned, it will be assigned by a PM.
- Do not change the layer color, line weight, or line type unless specifically asked to do so by a Project Manager. The only times this should occur is in the case of lower/upper millwork cabinetry, elevations/details, or various other rare situations. If unsure of how to proceed with differentiating between items on the same layer, check with a Project Manager for clarification/guidance.
- SPACE PLANNING & CONSTRUCTION DRAWINGS:** All Record Drawings have floor plates set at coordinates 0,0. During design development, space plans should be drawn within the active CAD file by copying the area of project scope above or out to the sides of the floor plate. Space planning should always be done using the correct layer standards. Upon receiving signature of approval on a space plan, the approved plan should be moved back into correct position within the floor plate.
- DRAWING CLEANUP:** During the process of converting a record drawing into an active drawing for a new project, and in the process of preparing construction documents, it is the responsibility of each individual who is working on that file to not only work cleanly, but also to clean up the existing drawing as you go.

Items that you should be aware of include:

- Corners whose lines don't meet up/touch
  - Copying notes without using Ortho to ensure that they align
  - When drawing squares, rectangles, or other shapes, use P-LINES or the correlating shape command instead of a series of individual lines
  - Drawing or leaving what should be one continuous line as several individual line segments
  - Use the Solid command to poche walls (instead of Hatch)
  - Use MText instead of Dtext
  - Trim overlapping lines
  - Trim lines at intersecting walls
  - Use a common pick point when copying the same entity multiple times (i.e. when copying the "E" label that denotes existing entities, use a common pick point so that the label is inserted at the same location at every occurrence)
  - Check all text for grammatical and spelling errors
  - Delete duplicate entities, such as several lines laying on top of one another, in order to maintain the integrity of the linetype when plotting
- ALWAYS DOUBLE-CHECK YOUR OWN WORK!!!**

## 2.7 AutoCAD Command Aliases

<u>Keyboard Alias</u>	<u>AutoCAD Command</u>
A	Arc
AA	Area/ Perimeter
BR	Break
BPOLY	Boundary
C	Circle
CH	Change
CO	Copy
D	Dim Style Manager
DC	Design Center
DAL	Dimension Align
DDEdit	Edit text, including dimension text
DI	Distance
DIV	Divide
DO	Donut
DT	DText
E	Erase
EX	Extend
F	Fillet
+ F	When trimming or extending, type in F to trim/extend with a fence
H	Hatch
HE	Hatch Edit
I	Insert
L	Line
Lead	Leader
LTS	LTSscale
M	Move
MI	Mirror
ML	Multiline
MT	MText
O	Offset
Oops	If something was erased accidentally
OS	OSnap
P	Pan
Painter	Match Properties
PEdit	Edit properties of p-lines
PL	Poly Line
PO	Point
POL	Polygon
PR	Properties
PU	Purge
REGEN	Regenerate
RO	Rotate
S	Stretch
SC	Scale
SP	Spell Check
SPL	Spline
ST	Text Style
TR	Trim
TR+Enter+Enter	All entities become cutting edges
TR+Enter+Enter+Shift	Toggles between trim and extend
TP	Tool Palette
UN	Drawing Units
X	Explode
XC	XClip
XL	XLine (Construction Line)
XR	XReference
Z	Zoom
F1- HELP	F7- GRID ON/OFF
F2- COMMAND TEXT WINDOW	F8- ORTHO ON/OFF
F3- OSNAP ON/OFF	F9- SNAP ON/OFF
	F10- POLAR TRACKING ON/OFF





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**SECTION G.1.0 - FACILITIES FIRE & LIFE SAFETY PROCEDURES**

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**1.0 FIRE & LIFE SAFETY PROCEDURES**

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**1.1 In-House Projects (No A/E)**

1. PM requests preliminary estimate based on email scope of work from Fire & Safety contractor
  - cc UNT Facilities Fire Systems
  - Fire & Safety Contractor to submit proof of qualifications (licensed/bonded, certified Notifier installer, etc.) with preliminary estimate
2. PM proceeds with programming and design development, design review process, and obtains client sign-off of project budget
3. PM requests work order for UNT Facilities Fire Systems charges.
4. PM requests a PO to Fire & Safety contractor
5. PM initiates site meeting to discuss scope
  - Meeting should be scheduled no less than three to five business days in advance
  - Attendees should include PM, Fire & Safety contractor, RMS, and UNT Fire Systems
6. Fire Safety contractor to conduct initial system test
  - PM to email group list FACL-FMC-FireNotify prior to initiating **any** test. (Reference section J, p 113 for sample email. Reference section J, p. 103-104 for email group list members.)
7. Fire & Safety contractor provides Fire Safety submittal packet to PM for review
  - Packet to include:
    - Equipment List
    - Product Specification Sheets
    - Drawings of proposed design
    - Voltage drop calculations
    - Loop resistance calculations
    - NAC power supply locations
    - Battery standby power calculations
    - \*Reference section I, p.91 for reasons a submittal may be rejected.
  - PM distributes to UNT Facilities Fire Systems for review and approval (within 3 – 5 business days)
  - Upon email approval from UNT Facilities Fire Systems, Fire Safety drawings incorporated into construction documentation

8. PM initiates pre-construction meeting
  - Attendees to include PM, Fire & Safety contractor, RMS, UNT Facilities Fire Systems, and all necessary contractors/subcontractors
  - PM / GC to provide work schedule
9. Construction begins
  - Fire & Safety contractor to receive notice to proceed from Facilities Purchasing
  - Fire & Safety contractor to schedule work through PM and notify PM when on-site
    - PM to notify UNT Facilities Fire Systems prior to any work occurring
  - If Fire & Safety contractor on-site outside of scheduled dates, notify UNT Facilities Fire Systems
  - PM to include UNT Facilities Fire Systems on all applicable inspections, and obtain proper documentation of inspection results using Project Inspection Form
  - PM to initiate and attend pre-test 3-5 days prior to final test
    - PM to notify Building Rep, UNT Facilities Fire Systems, and RMS if initiating alarm
    - PM to issue list of reasons final test may fail to Fire & Safety contractor (reference section I, p. 96.)
10. Commissioning
  - PM to initiate and schedule final test with UNT Facilities Fire Systems 3-5 days in advance
  - Attendees to include PM, Fire & Safety contractor, RMS, and UNT Facilities Fire Systems – PM to sign inspection form and note any required system modifications
  - PM to schedule any work for resulting punch items
  - PM to obtain as-built drawings from Fire Safety contractor upon completion of job – submit copy to UNT Facilities Fire Systems
11. Invoices submitted to PM for approval and payment
  - PM to confirm with UNT Facilities Fire Systems via email that all work satisfactorily complete before processing payment (confirmation received within 1 - 2 business days)

## **1.2 IDIQ Projects (Designed by A/E)**

1. Submittal packet included as part of 90% Review Set received from architect
  - Packet to include:
    - Equipment List
    - Product Specification Sheets
    - Drawings of proposed design
    - Voltage drop calculations
    - Loop resistance calculations
    - NAC power supply locations
    - Battery standby power calculations
  - UNT Facilities Fire Systems participates in review process and includes mark-ups on 90% set to be returned to architect for revision
2. PM initiates pre-construction meeting
  - Attendees to include PM, Fire & Safety contractor, RMS, UNT Facilities Fire Systems, and all necessary contractors/subcontractors



- Fire Safety subcontractor to submit qualifications for review and approval by UNT Facilities Fire Systems prior to conducting any work (licensed/bonded, certified Notifier installer, etc.)
  - PM / GC to provide work schedule
3. Construction begins
- Fire & Safety contractor to receive notice to proceed from Facilities Purchasing
  - Fire & Safety contractor to schedule work through PM and notify PM when on-site
    - PM to notify UNT Facilities Fire Systems prior to any work occurring
  - If Fire & Safety contractor on-site outside of scheduled dates, notify UNT Facilities Fire Systems
  - PM to include UNT Facilities Fire Systems on all applicable inspections, and obtain proper documentation of inspection results using Project Inspection Form
  - PM to initiate and attend pre-test 3-5 days prior to final test
    - PM to notify Building Rep, UNT Facilities Fire Systems, and RMS
    - PM to issue list of reasons final test may fail to Fire & Safety contractor (reference section I, p. 96).
4. Commissioning
- PM to initiate scheduling of final test with UNT Facilities Fire Systems 3-5 days in advance
  - Attendees to include PM, Fire & Safety subcontractor, RMS, and UNT Facilities Fire Systems – PM to sign inspection form and note any required system modifications
  - PM to schedule any work for resulting punch items
  - PM to obtain as-built drawings from Fire Safety subcontractor upon completion of job – submit copy to UNT Facilities Fire Systems
5. Invoices submitted to PM for approval and payment
- PM to confirm with UNT Facilities Fire Systems via email that all work satisfactorily complete before processing payment (confirmation received within 1 - 2 business days)

## FIRE AND LIFE SAFETY RELATED DUTIES

Texas Government Code 417.008 establishes the State Fire Marshal's Office as the Authority Having Jurisdiction for fire safety in all state owned buildings. The Associate Vice Chancellor for UNT System Facilities has been designated as the Building Official in accordance with UNT System Regents Rules 11.209 Building Code. Only these two officials have the authority to make code interpretations and official rulings concerning code issues.

### RISK MANAGEMENT

#### RESPONSIBILITY FOR FIRE AND LIFE SAFETY RELATED DUTIES

Code interpretations, as validated with specific references from NFPA and State Fire Marshal (SFM), and Code enforcement support and consultation/collaboration with Facilities, SFM and City Fire Marshal for additional support to include: plan reviews and arson investigations.

- Review of construction plans and specifications for compliance with Life Safety Code. Note: This does not constitute formal review for compliance with code, which must be accomplished by an authorized professional.
- Primary point of contact with State Office of Risk Management and State Fire Marshal for coordination of inspections, questions concerning code interpretation and plan review.

Conduct Life Safety Code inspections of UNT facilities and notify occupant and responsible maintenance activity of required corrective actions.

Provide oversight of Facilities Fire Systems PM activities to ensure compliance with NFPA code requirements.

### FACILITIES

#### RESPONSIBILITY FOR FIRE AND LIFE SAFETY RELATED DUTIES

Code interpretations and Code enforcement support and consultation/collaboration with RMS in relation to fire alarm, extinguishing, sprinkler and suppression systems.

- Review of construction plans and specifications for operability, maintainability and compliance with relative UNT Design Guidelines and NFPA Codes for such systems.  
Note: This does not constitute formal review for compliance with code, which must be accomplished by an authorized professional.
- Participate in inspections with State Fire Marshal's office and RMS and request code interpretation and plan review questions through RMS.

Operation and maintenance related functions to for fire alarm, extinguishing and sprinkler systems. Inspecting, testing and maintaining alarm, extinguishing and sprinkler systems to include installing, maintaining and replacing systems components; scheduling or performing inspections of all kitchen and special hazards extinguishing systems and providing on call support to respond to alarm troubles. Respond to all system activations.

FIRE AND LIFE SAFETY RELATED DUTIES

Respond to all fire emergencies for purposes of assisting and gathering information for investigation of actual fires.

Conduct fire and arson investigations in collaboration with Facilities Fire Systems Supervisor and submit report to State Fire Marshal.

Maintain fire safety right to know information log as an open record.

Bonfire design, consultation, issues and supervision.

Consultations for pyrotechnics displays including coordination with Athletics and Kiwanis for 4<sup>th</sup> of July.

Evacuation Drills assistance and plans updating; coordination with Building reps and SECs (Safety Evacuation Coordinators).

Fire safety training in collaboration with Facilities Fire Systems Supervisor.



Doug Welch  
Director, Risk Management Services

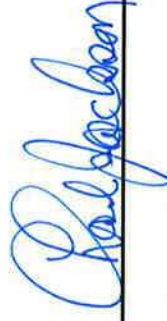
Installation of new and replacement systems and consultation with designers on modification of existing systems in conjunction with renovation projects.

Respond to all actual fire emergencies for purposes of monitoring and resetting systems and assisting in gathering information related to system activation and response for investigation purposes.

Support RMS in conducting fire investigations.

Cooperate with and support RMS for special activities that require the expertise and/or manpower of the Fire Systems work center.

- Fire safety training in collaboration with RMS.
- Participation in evacuation drills when alarm activation is desired.



Charles Jackson  
Assistant Vice President for Facilities



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**SECTION G.2.0 - FACILITIES ASBESTOS ABATEMENT PROCEDURES**

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**2.1 SCOPE**

After the PM determines the planned scope of work (design/layout) for a project they will:

- Contact RMS for testing of the affected areas.
- PM will provide RMS (Matt Moncus) will a floor plan with the areas to be tested marked.
- RMS initial basic test will include: VCT, wall texture, joint compound & ceiling tile. We will reimburse RMS 50% of the cost of asbestos sampling effective March 1, 2010. When sampling occurs prior to a final estimate and budget being developed and signed by the customer we will reimburse RMS from the local project clearing account F80099.
- If requested they will also test pipe insulation, duct work, ceiling insulation, wall insulation, window sealant & glazing, chalk board mastic, tile grout.
- If asbestos is present, RMS (Matt Moncus) will provide the PM with a maintenance permit disapproving the work listed.
- The PM will then determine the scope of abatement based on the final project design.

**2.2 SMALL ABATEMENT PROJECTS**

- Small abatement projects (defined as: pipe insulation under 260 lf, flooring less than 160 sf or 35 cu. ft of material) may be done by Facilities in-house licensed staff.
- A 10 day notification is required every time at a charge of \$100 each.

**2.3 LARGE ABATEMENT PROJECTS**

- PM sends an e-mail requesting a quote from UNT's current abatement job order contractor (Fernando Avila, Intercon) & also the air monitoring contractor. Cc: Lynda Hutson, Mike Reynolds, & Darren Bowden (Southwest Geoscience)
- A site visit may be required. If so Mike Reynolds should be present along with the superintendent.
- Quote should be received by PM and forwarded to Mike Reynolds cc: Lynda Hutson for record keeping.

**2.4 FUNDING FOR ABATEMENT**

- Abatement for Maintenance projects are always covered by the Facilities abatement account
- Abatement for Auxiliary projects are always paid for by the department
- Abatement for E&G projects will be paid for by the department unless the cost becomes prohibitive or if the abatement is more than 50% of the total project cost. In which case the Facilities abatement account will cover a portion. The exact amount will be determined on a case by case basis and as funds permit.

## 2.5 **SCHEDULING AND NOTIFICATION**

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- All abatement contractors must notify RMS thru Matt Moncus when they arrive on campus.
- Superintendent schedules abatement work through Mike Reynolds (PM will do this for JOC & GC projects) cc: Lynda Hutson
- Mike Reynolds will contact the abatement contractor to arrange the start of work and arrange for the notification.
- When abatement is being done by the GC, the GC needs to provide the PM when the notification is sent in. The PM needs to inform RMS (Matt Moncus)
- The day before construction starts RMS (Matt Moncus) will post notices on the construction site of the pending abatement work

## 2.6 **CONSTRUCTION**

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- The day before the start of abatement Mike Reynolds will ensure that fire alarms have been removed, water is in place, locations for outside ducting are established, a location is identified for the field office, the HVAC is shut down
- On the first day of work the abatement contractor will meet at the job site with Mike Reynolds & Matt Moncus to ensure all arrangements are in order.
- Matt Moncus will check the abatement contractors licensing credentials
- RMS will have a representative on-site for the duration of the abatement.

## 2.7 **ABATEMENT COMPLETION**

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- RMS will inspect the job site to ensure work is adequately completed
- Mike Reynolds will receive the report from the abatement contractor and forward to RMS.
- RMS will add to the abatement database and keep a permanent record of abatement work done on the campus.

## 2.8 **INVOICES**

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- When the project budget is paying for all or part of the abatement work the invoice needs to be approved by the PM.
- Abatement work paid by the facilities abatement account should be processed by Lynda Hutson.



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**SECTION G.3.0 - FACILITIES PAINT PROCEDURES**

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**3.1 COLOR SELECTION FOR WORK ORDER REQUESTS**

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When the paint shop receives a request for painting a room they will meet with the customer to determine their needs and explain the color choices as follows:

- UNT standard maintenance colors or the approved building standard paint colors for that building as shown in the paint standard binder.
- Under special circumstances, a Facilities Project Manager may provide alternative color selections for a given location.

**3.2 COSTS FOR MAINTENANCE PAINTING**

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- The cost for maintenance painting of office suites will always be the responsibility of the department. In special cases when the office is E&G space and the painting supports the university mission, Facilities may offer to match departmental funds to cover the cost.
- The cost of maintenance painting of public areas, hallways, public spaces, classrooms, laboratories, restrooms and other common areas will be the responsibility of Facilities.

**3.3 PAINTING FOR PROJECTS**

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- Painting for projects will be paid for by the funding source for the project.
- In special cases when the project consists of E&G space and the painting supports the university mission, Facilities may offer to match departmental funds to cover the cost.

**3.4 PAINT SPECIFICATIONS**

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- Interior Walls:  
Paint type: Sherwin Williams "Harmony", acrylic  
Sheen: Egg shell
- Interior Wall (alternative):  
Paint type: ICI "Life master 2000"  
Sheen: Egg shell
- Trim:  
Paint type: Sherwin Williams "Pro classic", water based enamel  
Sheen: Semi-gloss
- Trim (alternative):  
Paint type: ICI "DevFlex"  
Sheen: Semi-gloss

**3.5 PAINT LOG**

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- At the end of a JOC/GC project the PM will e-mail Keith Cook the following information for the paint log.
  - a. Contractor name and project completion date
  - b. Building name & room number
  - c. Wall color, accent wall color, trim color and corresponding paint type, sheen & number of gallons used in the room.

- At the end of an in-house project the Facilities Superintendent will e-mail Keith Cook the following information for the paint log.
  - a. Contractor name and project completion date
  - b. Building name & room number
  - c. Wall color, accent wall color, trim color and corresponding paint type, sheen & number of gallons used in the room.

### **3.6 PAINTING RESPONSIBILITY**

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It is the responsibility of the Facilities Department for all painting of UNT property. Painting by occupants is not permitted due to insurance liability issues and state IAQ regulations. If UNT property is painted without authorization/ permission from Facilities they may be charged to repaint/repair/clean up areas.



**UNIVERSITY OF NORTH TEXAS**  
OFFICE OF FACILITIES MANAGEMENT AND CONSTRUCTION

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**SECTION G.4.0 - FACILITIES PAINT STANDARDS**

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▪ **MAINTENANCE PALLETTE**

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- **Field Colors**
  - SW 7005 Pure White
  - SW 6385 Dover White
- **Accent Colors**
  - SW 6106 Kilim Beige
  - SW 6128 Blonde
  - SW 6148 Wool Skein
  - SW 7044 Amazing Gray

▪ **PALLETTE ONE**

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- **Field Colors**
  - SW 6385 Dover White
  - SW 6106 Kilim Beige
- **Neutral Accents\***
  - SW 6108 Latte
  - SW 6109 Hopsack
- **Color Accents\***
  - SW 6207 Retreat
  - SW 1059 Unusual Gray
  - SW 7074 Software

▪ **PALLETTE TWO**

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- **Field Colors**
  - SW 6385 Dover White
  - SW 6128 Blonde
- **Neutral Accents\***
  - SW 6130 Mannered Gold
  - SW 6131 Chamois
- **Color Accent\***
  - SW 7074 Software



▪ **PALLETTE THREE**

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- **Field Colors**
  - SW 6385 Dover White
  - SW 7044 Amazing Gray
- **Neutral Accents\***
  - SW 7045 Intellectual Gray
  - SW 7046 Anonymous
- **Color Accents\***
  - SW 6207 Retreat
  - SW 1059 Unusual Gray
  - SW 6179 Artichoke

▪ **PALLETTE FOUR**

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- **Field Colors**
  - SW 7005 Pure White
  - SW 6148 Wool Skein
- **Neutral Accents\***
  - SW 6121 Whole Wheat
- **Color Accent\***
  - SW 6158 Sawdust

▪ **PALLETTE FIVE**

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- **Field Colors**
  - SW 6385 Dover White
  - SW 7044 Amazing Gray
- **Neutral Accents\***
  - SW 7038 Tony Taupe
  - SW 7039 Virtual Taupe
- **Color Accents\***
  - SW 6207 Retreat
  - SW 0032 Needlepoint Navy

▪ **ADMINISTRATION BUILDING PALLETTE ONE**

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- **Field Colors**
  - SW 7005 Pure White
  - SW 6077 Everyday White
- **Neutral Accents\***
  - SW 6078 Realist Beige
  - SW 6080 Utterly Beige

▪ **ADMINISTRATION BUILDING PALLETTE TWO**

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- **Field Colors**
  - SW 7005 Pure White
  - SW 6140 Moderate White
- **Neutral Accents\***
  - SW 6141 Softer Tan
  - SW 6143 Basket Beige

▪ **EAGLE STUDENT SERVICES CENTER PALETTE**

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- **Field Colors**
  - SW 7064 Passive
  - SW 7005 Pure White
- **Color Accents\***
  - SW 6192 Coastal Plain
  - SW 6244 Naval

▪ **GATEWAY CENTER PALETTE**

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- **Field Colors**
  - SW 6385 Dover White
  - SW 7005 Pure White
- **Neutral Accent\***
  - SW 6107 Nomadic Desert
- **Color Accents\***
  - SW 0014 Sheraton Sage
  - SW 2856 Fairfax Brown

▪ **UNIVERSITY UNION PALETTE ONE**

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- **Field Colors**
  - SW 7005 Pure White
  - SW 6385 Dover White
- **Neutral Accent\***
  - SW 6108 Latte
  - SW 6109 Hopsack
- **Color Accents\***
  - SW 6207 Retreat
  - SW 7059 Unusual Gray
  - SW 7074 Software

▪ **UNIVERSITY UNION PALETTE TWO**

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- **Field Colors**
  - SW 6385 Dover White
  - SW 6128 Blonde
- **Neutral Accent\***
  - SW 6130 Mannered Gold
  - SW 6131 Chamois
- **Color Accent\***
  - SW 7074 Software

▪ **UNIVERSITY UNION PALETTE THREE**

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- **Field Colors**
  - SW 6385 Dover White
  - SW 7044 Amazing Gray
- **Neutral Accents\***
  - SW 7045 Intellectual Gray
  - SW 7046 Anonymous
- **Color Accents\***
  - SW 6207 Retreat
  - SW 1059 Unusual Gray
  - SW 6179 Artichoke

▪ **CHESTNUT ICI PAINT PALETTE**

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- **Field Colors**
  - Jefferson House
- **Neutral Accent\***
  - Manuscript
  - Tumbleweed Trail
- **Color Accents\***
  - Romanesque Gold
  - Sorrel
  - Country Blue



**UNIVERSITY OF NORTH TEXAS**  
OFFICE OF FACILITIES MANAGEMENT AND CONSTRUCTION

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**SECTION G.5.o - TELECOMM/DATACOMM PROJECT PROCEDURES**

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\*\*\* Note: FMC to send Monthly Project Lists to Dowl Morrow, Ken Sedgely, CR Chevli, and Blake Meyer \*\*\*

**5.1 DESIGN PHASE**

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1. Client fills out move matrix and routes to Network Support Manager for review and comment.
2. Client submits finalized matrix to PM with signed drawing.
3. PM submits drawings and matrix for estimate.
  - a. PM issues drawings and matrix via email to: Dowl Morrow, cc: Gary Primeaux, Blake Meyer, Ken Sedgely, and CR Chevli.
  - b. PM enters Remedy ticket (per drawings) for wiring request – Gary enters phone requests.
  - c. Dowl forwards information to Blake.
  - d. T-Comm confirms needs outlined in matrix and plans with users' Network Support Manager
  - e. T-Comm prepares and submits Guaranteed Estimate to PM for client approval.

**5.2 CONSTRUCTION PHASE**

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1. PRE-CONSTRUCTION MEETING – Dowl to attend to coordinate construction schedule.
2. Superintendent takes over scheduling of work and becomes primary point of contact.
  - a. T-Comm coordinates with superintendent on wiring to closet.
  - b. D-Comm installs switches, etc.
  - c. T-Comm relocates phone #'s and installs new lines (Gary.)

**5.3 BILLING PHASE**

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1. Wiring auto bill to project Dept Id by Dowl.
2. CR sends email to notify PM of amount that is being taken out of project Dept Id.
3. Phone charges (if project pays) via auto bill by Gary.



UNIVERSITY OF NORTH TEXAS  
OFFICE OF FACILITIES MANAGEMENT AND CONSTRUCTION

TAS REVIEW CHECKLIST

1.0 DESIGN DEVELOPMENT & ESTIMATE	Date Complete
<p>Projects where the combined demolition and construction budget is either over \$50,000 or where a change order may push the total above \$50,000 will require TAS review and inspection:</p> <ul style="list-style-type: none"> <li><input type="radio"/> During development of the project estimate, include a line item for TAS review and inspection (approximately \$1,500)</li> </ul>	<p>_____</p>
2.0 PROJECT APPROVAL & SUBMISSION	
<ul style="list-style-type: none"> <li><input type="radio"/> Upon funding approval, PM should request a formal proposal for TAS review/inspection from a Registered Accessibility Specialist (RAS) and process a PO to the RAS</li> </ul>	<p>_____</p>
<ul style="list-style-type: none"> <li><input type="radio"/> When a PO is requested for the construction portion of the job, the date of the PO request is considered the <b>Date of Issue</b>. <b>Within 20 days of the Date of Issue, the PM must submit the following to the RAS:</b> <ul style="list-style-type: none"> <li><input type="radio"/> Architectural Barriers Project Registration Form</li> <li><input type="radio"/> Proof of Submission Form</li> <li><input type="radio"/> One complete hard copy set of Construction Drawings sealed by an architect to RAS</li> </ul> </li> </ul>	<p>_____</p>
3.0 AFTER COMPLETION OF CONSTRUCTION	
<ul style="list-style-type: none"> <li><input type="radio"/> <b>Within 30 days of construction completion date</b> (i.e. the date the Certificate of Occupancy was signed), PM must submit Request for Inspection Form to the RAS and schedule inspection. PM must accompany RAS on inspection.</li> </ul>	<p>_____</p>
<ul style="list-style-type: none"> <li><input type="radio"/> A Proof of Inspection form is to be completed at the time of the inspection by the RAS and the PM</li> </ul>	<p>_____</p>
<ul style="list-style-type: none"> <li><input type="radio"/> RAS will provide an inspection report to the PM</li> </ul>	<p>_____</p>
<ul style="list-style-type: none"> <li><input type="radio"/> Violations must be addressed within 270 days from the date of the inspection report. (Funding by project or other)</li> </ul>	<p>_____</p>
<ul style="list-style-type: none"> <li><input type="radio"/> When all violations are corrected, submit Inspection Response form to RAS</li> </ul>	<p>_____</p>

Note: H. Bailey or C. Jackson will sign where TDLR forms require signature of Owner.

**DRAFT**



TEXAS DEPARTMENT OF LICENSING AND REGULATION

P.O. Box 12157, Austin, Texas 78711
(512) 463-6599 • (800) 803-9202 • FAX (512) 475-2871
customer.service@license.state.tx.us • www.license.state.tx.us

For Department Use Only

EABPRJ

IMPORTANT INSTRUCTIONS - PLEASE READ BEFORE BEGINNING

This is only the REGISTRATION of the construction project. The building/facility owner is responsible for ensuring that the Project Registration Form, construction documents, and applicable fees are mailed, shipped, or hand delivered to TDLR or a Registered Accessibility Specialist (RAS) for the required review and inspection of the project. Please print or type.

ARCHITECTURAL BARRIERS PROJECT REGISTRATION FORM

Form with sections: PERSON REGISTERING PROJECT, PROJECT, TENANT (if other than owner), BUILDING OR FACILITY OWNER (person or entity that holds title to property), DESIGN FIRM, PROJECT DESCRIPTION. Includes fields for Name, Address, City, State, Zip, Phone, Email, and checkboxes for license types and work types.

DRAFT

NOTE: An individual who completes this form... The Texas Department of Licensing and Regulation (the Dept.) is entitled to the following: 1) to be informed about the information... 2) to receive and review the information... 3) to have the Dept. correct information about the individual that is incorrect...

\*\*The Department will add your address to the Architectural Barriers email notification list, which automatically provides Department information on matters affecting Architectural Barriers. Your email address is confidential pursuant to the Texas Public Information Act; therefore, we will not disclose your email address. For most current version of form, visit TDLR website. link to: http://www.license.state.tx.us/newsletters/TDLRnotificationLists.asp

# INSTRUCTIONS FOR COMPLETING A PROJECT REGISTRATION FORM – AB 005

1. **Person Registering Project Name** – Enter the name of the person completing the form
2. **Address** – Enter the mailing address and suite number (if applicable) of the person named in #1
3. **Phone** – Enter the phone number and email address (optional) of the person named in #1
4. **Project Name** - Enter the name of the project (examples: CLASSROOM ADDITION, TENANT FINISH OUT FOR DR. SMITH)
5. **Building / Facility Name** - If this project is located in a building or facility with a name, enter the name (examples: the "CLASSROOM ADDITION" is located in the building or facility named "WASHINGTON HIGH SCHOOL"; the "TENANT FINISH OUT FOR DR. SMITH" is located in the office building named "MEDICAL PLAZA II")
6. **Project Address** - Enter the physical address (if available) and the suite number (if applicable) of the project. Post Office Box numbers are not acceptable.
7. **Tenant Contact Name** - Enter the name and phone number for the contact person or persons, company, corporation, authority, commission, board, governmental entity, institution or any other unit that will occupy the project space.
8. **Building or Facility Owner** - Enter the name and phone number of the person or entity (company, corporation, authority, commission, board, governmental entity, institution or any other unit) that holds title to the property.
9. **Owner Address** - Enter the mailing address and the suite number (if applicable) of the facility owner named in #9.
10. **Contact Name** - If there is a contact person other than the facility owner (as listed in #9), enter the name and phone number of the person representing the owner
11. **Contact Address** - Enter the mailing address and the suite number (if applicable) of the person named in #11 if other than the owner.
12. **Contact Phone** – Enter the phone number and email address (optional) of the person named in #11 if other than the owner
13. **Design Firm** - Enter the name and phone number of the design firm or company responsible for the design of the project.
14. **Firm Address** - Enter the mailing address and the suite number (if applicable) of the firm named in #14.
15. **Designer Name** - Enter the name of the architect, engineer, interior designer, or landscape architect with overall responsibility for the design of the project and whose seal is affixed to the drawings and enter their e-mail address.
16. **Type of License** - Check the box for the applicable license type of the designer and enter the license number (if applicable). If no design professional, check the box for "other".
17. **Start Date** - Enter the date construction is scheduled to begin (month and year).
18. **Completion Date** - Enter the date construction is scheduled to be completed (month and year).
19. **Estimated Cost** - Enter the estimated cost of construction. Cost should not include site acquisition, furnishings, or equipment that is not part of the building mechanical systems.
20. **Type of Work** – Check the box for the applicable type of work.
21. **Type of Funds** - Check the box for the applicable method of funding.
22. **State Lease No.** (if applicable) - Enter the state lease number if the construction project is for purposes of a state agency lease contract and/or occupancy by a state agency.
23. **Does this building(s) have more than one level?** – Check yes or no
24. **Are there any elevators, escalators, or platform lifts in this building?** – Check yes or no
25. **Does this building(s) have any boilers?** – Check yes or no
26. **Scope of Work** - Enter a detailed description of the construction activities.

## WHAT TO SUBMIT

1. One complete set of construction documents (plans and specifications) for all disciplines. All documents applicable to the project should be submitted as one package.
2. A completed Architectural Barriers Project Registration Form or AB Project Registration Confirmation page for each site/address or State Lease Registration Form (if applicable).
3. If the review and/or inspection will be performed by TDLR, submit a check or money order payable to "Texas Department of Licensing and Regulation" at P.O. Box 12157, Austin, Texas 78711.
4. When construction documents are submitted **after** completion of construction, the late submittal Project Filing fee shall apply.
5. An architect, interior designer, landscape architect, or engineer with overall responsibility for the design of a building or facility subject to §469.101 of the Act, shall mail, ship, or hand-deliver the construction documents along with a Proof of Submission form to the department, a registered accessibility specialist, or a contract provider not later than the fifth day after the plans and specifications are issued. In computing time under this subsection, a Saturday, Sunday or legal holiday is not included.
6. In instances when there is not a design professional with overall responsibility, the owner of a building or facility subject to §469.101 of the Act, shall mail, ship, or hand-deliver construction documents to the department, a registered accessibility specialist, or a contract provider prior to filing an application for building construction permit or commencement of construction.
7. An Elimination of Architectural Barriers Project Registration form or Architectural Barriers Project Registration Confirmation Page must be completed for each subject building or facility and submitted along with the applicable fees when the design professional or owner submits the construction documents. (One complete set of construction documents (plans and specifications) for all disciplines). All documents applicable to the project should be submitted as one package.

## TDLR FEE SCHEDULE

The following fees are applicable only to services performed by TDLR.  
**(Note: If services will be performed by a RAS, please contact the RAS for fee information as they set and collect their own fees.)**

Estimated Construction Cost	Plan Review Fee	TDLR Project Filing Fee	Inspection Fee
50,000 - 200,000	\$250	\$175	\$350
200,001 - 500,000	\$315	\$175	\$375
500,001 - 1,000,000	\$380	\$175	\$400
1,000,001 - 5,000,000	\$445	\$175	\$445
5,000,001 - 10,000,000	\$575	\$175	\$575
10,000,001 - 15,000,000	\$620	\$175	\$620
15,000,001 - 25,000,000	\$785	\$175	\$785
25,000,001 - 50,000,000	\$955	\$175	\$955
50,000,001 - 75,000,000	\$1175	\$175	\$1175
> 75,000,000	Contact TDLR	\$175	Contact TDLR
Late Project Filing Fee		\$300	
Preliminary Review Fee		\$145 each	
State Lease Inspection (no construction)		\$225 per lease	
Special Inspection Fee		\$215 per hour, one hour minimum	
Variance Application Fee		\$175 each	
Variance Appeal Fee		\$200 each	

**Example:** Estimated construction cost is \$250,000; submit the project registration form and pay the review fee of \$315.00 for a total of \$490.00. The inspection fee would be \$375.00.

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**NOTE: All fees are non-refundable.**

For most current version of form, visit TDLR website.



TEXAS DEPARTMENT OF LICENSING AND REGULATION  
**COMPLIANCE DIVISION - ARCHITECTURAL BARRIERS**

P.O. Box 12157 • Austin, Texas 78711 • (512) 463-3211 • (877) 278-0999 • FAX (512) 475-2886  
 architectural.barriers@license.state.tx.us • [www.license.state.tx.us](http://www.license.state.tx.us)

**REQUEST FOR INSPECTION**

In accordance with the Texas Architectural Barriers Act, Texas Government Code, Chapter 469, and Administrative Rule 68.52, the owner of a building or facility subject to Chapter 469.101 of the Act shall obtain an inspection from the department, a registered accessibility specialist, or a contract provider not later than the first anniversary of the completion of construction.

The request for an inspection must be made by completing this form and submitting it to the department, a registered accessibility specialist, or contract provider not later than 30 calendar days after the completion of construction. If the Request for Inspection form is submitted to the Department, the form must be accompanied by the applicable inspection fee.

The department, a registered accessibility specialist, or a contract provider must receive the completed Request for Inspection form prior to proceeding with the inspection. Following the inspection, the owner will be advised in writing of the results.

**PROJECT INFORMATION**

PLEASE PRINT OR TYPE

1. Project Name:		2. EABPRJ #:
3. Project Address:		Suite #:
City:	County:	Zip:

**OWNER / AGENT INFORMATION**

(Check One) I am  the Owner (the person/entity that holds title to the property) or  the Owner's Agent

4. Name:		5. Company / Agency:	
6. Address:			Suite #:
City:		State:	Zip:
7. Phone:	8. Fax:	9. **Email:	
10. Signature of Owner/Designated Agent			Date

I have authorized the following to perform the inspection (Check One)

Texas Department of Licensing and Regulation

Contract Provider

Registered Accessibility Specialist RAS # \_\_\_\_\_ RAS Name \_\_\_\_\_

TDLR FORM AB041 03-07

NOTE: An individual who completes and files this form with the Texas Department of Licensing and Regulation (the Dept.) is entitled to the following:

- 1) to be informed of information that the Dept. collects about the individual, upon their request and subject to a few exceptions;
- 2) to access and correct information, under Sections 552.021 and 552.023 of the Texas Govt. Code; and
- 3) to have the Dept. correct information about the individual that is incorrect, under Section 559.004 of the Texas Govt. Code.

**DRAFT**

\*\*The Department will add your address to the Architectural Barriers email notification list, which automatically provides Department information on matters affecting Architectural Barriers. Your email address is confidential. For most current version of form, visit TDLR website. <http://www.license.state.tx.us/newsletters/TDLR-announcement-ras-ras.asp>





TEXAS DEPARTMENT OF LICENSING AND REGULATION  
**COMPLIANCE DIVISION - ARCHITECTURAL BARRIERS**

P.O. Box 12157 • Austin, Texas 78711 • (512) 539-5669 • (877) 278-0999 • FAX (512) 539-5690  
 architectural.barriers@license.state.tx.us • [www.license.state.tx.us](http://www.license.state.tx.us)

**PROOF OF INSPECTION**

The inspection of the referenced construction project was performed on \_\_\_\_\_ (Date)

The inspection was performed by (Check One):

Texas Department of Licensing and Regulation Name: \_\_\_\_\_

Contract Provider Name: \_\_\_\_\_

Registered Accessibility Specialist Name: \_\_\_\_\_ RAS #: \_\_\_\_\_

**\*\*IMPORTANT INFORMATION\*\***

This form is issued by the Texas Department of Licensing and Regulation (TDLR) for the purpose of providing proof of inspection to the building owner and is not intended to imply that a Registered Accessibility Specialist or contract provider is an employee of the department or that they have been hired by the department to perform this inspection.

**PROJECT INFORMATION**

**PLEASE PRINT OR TYPE**

1. Project Name:		2. EABPRJ #:
3. Project Address:		Suite #:
City:	County:	Zip:

**INSPECTOR INFORMATION**

4. Name:		5. RAS # (if applicable):	
6. Company/Agency:			
7. Address:		Suite #:	
City:		State:	Zip:
8. Phone:	9. Fax:	10. **Email:	
I certify that I have performed an inspection of the referenced construction project:			
11. Signature of Inspector		Date	

**OWNER/OWNER DESIGNEE\* PRESENT DURING THE INSPECTION**

12. Name:			
13. Company/Agency:			
14. Address:		Suite #:	
City:		State:	Zip:
15. Phone:	16. Fax:	17. **Email:	
I certify that I was present during the inspection of the referenced construction project:			
18. Signature of Owner / Designee		Date	

\*The designee may be someone other than the owner or designated agent referenced in Administrative Rule 68.10(10)

TDLR FORM 044AB 12-08

NOTE: An individual who completes and files this form with the Texas Department of Licensing and Regulation (the Dept.) is entitled to the following:

- 1) to be informed about the information the Dept. collects about the individual, upon their request and subject to a few exceptions;
- 2) to receive information under Sections 552.021 and 552.023 of the Texas Govt. Code; and
- 3) have the right to request information about the individual that is incorrect, under Section 559.004 of the Texas Govt. Code.

**DRAFT**

\*\*The Department will add your address to the Architectural Barriers email notification list, which automatically provides Department information on matters affecting Architectural Barriers. Your email address is confidential pursuant to the Texas Government Code. For most current version of form, visit TDLR website. <http://www.license.state.tx.us/newsletters/TDLR> with the public. For additional information link to:

# UNIVERSITY OF NORTH TEXAS™

OFFICE OF FACILITIES MANAGEMENT & CONSTRUCTION  
 ph: (940)565-4974 | fax: (940)565-4650 | <http://www2.facilities.unt.edu/depts/fmc>

Rev. 01/2010

## PROJECT INITIATION WORKSHEET

**Purpose of Form:** To initiate design, formal estimating, and implementation services for project requests. "Projects" involve multiple trades and have a cost that exceeds \$3,500.

Once a PIW is received and a design is finalized, a formal estimate will be prepared which will be a Guaranteed Price.

**When to use:** When a department has a need for a project to be implemented within a definite time frame, and a funding source has been identified. Examples include: departmental relocations, cubicle re-configuration, cosmetic upgrades, furniture procurement, and complete space remodels.

### SPACE ASSESSMENT COMMITTEE (SAC) APPROVAL

Is space being reassigned across academic or admin units; or is this a request for "new" space?	<input type="radio"/> YES <input type="radio"/> NO	If yes, has a Space Request Form been submitted to the Space Assessment Committee?	<input type="radio"/> YES <input type="radio"/> NO	Has the request been approved?	<input type="radio"/> YES <input type="radio"/> NO
---	---	--	---	--------------------------------	---

### CONTACT INFORMATION

<b>Authored Date:</b>	<b>Requesting Department:</b>

**Project Contact Info:** (Identify one person with whom Facilities can work with on this project)

Name:	Phone:	E-mail:

### PROJECT DETAILS

<p><b>Building:</b></p> <div style="border: 1px solid black; height: 20px; width: 100%;"></div> <p><b>Room Number(s):</b> (use commas)</p> <div style="border: 1px solid black; height: 20px; width: 100%;"></div> <p>If not within a building, describe location below:</p> <div style="border: 1px solid black; height: 20px; width: 100%;"></div>	<p><b>General Information: (check all that apply)</b></p> <table border="0" style="width: 100%;"> <tr> <td><input type="checkbox"/> Structural Remodel (move walls, doors, etc.)</td> <td><input type="checkbox"/> Furnishings</td> </tr> <tr> <td><input type="checkbox"/> Finishes (e.g carpet/paint)</td> <td><input type="checkbox"/> Box Move</td> </tr> <tr> <td><input type="checkbox"/> System Furniture</td> <td><input type="checkbox"/> Equipment</td> </tr> <tr> <td><input type="checkbox"/> Building System Remodel (power, voice/data, A/C, etc.)</td> <td><input type="checkbox"/> Space Efficiency Study (room layout, storage needs, etc.)</td> </tr> </table>	<input type="checkbox"/> Structural Remodel (move walls, doors, etc.)	<input type="checkbox"/> Furnishings	<input type="checkbox"/> Finishes (e.g carpet/paint)	<input type="checkbox"/> Box Move	<input type="checkbox"/> System Furniture	<input type="checkbox"/> Equipment	<input type="checkbox"/> Building System Remodel (power, voice/data, A/C, etc.)	<input type="checkbox"/> Space Efficiency Study (room layout, storage needs, etc.)	<p><b>Desired Start Date:</b></p> <div style="border: 1px solid black; height: 20px; width: 100%;"></div> <p><small>(Place cursor on date field for important message)</small></p> <p><b>Desired Completion Date:</b></p> <div style="border: 1px solid black; height: 20px; width: 100%;"></div>
<input type="checkbox"/> Structural Remodel (move walls, doors, etc.)	<input type="checkbox"/> Furnishings									
<input type="checkbox"/> Finishes (e.g carpet/paint)	<input type="checkbox"/> Box Move									
<input type="checkbox"/> System Furniture	<input type="checkbox"/> Equipment									
<input type="checkbox"/> Building System Remodel (power, voice/data, A/C, etc.)	<input type="checkbox"/> Space Efficiency Study (room layout, storage needs, etc.)									
<p><b>Scope of work (be as descriptive as possible):</b></p> <div style="border: 1px solid black; height: 150px; width: 100%;"></div>										

### FUNDING SOURCE & PROJECT APPROVAL

<b>DeptID/ProjID:</b>	<b>DeptID/ProjID Holder Name:</b>	<b>DeptID/ProjID Holder Signature</b>

**Unidentified Funding Justification:**

<input type="checkbox"/> Application for grant	<input type="checkbox"/> Other (explain):
<input type="checkbox"/> Seeking donor funding	

**Dean/Director Approval**

<b>Name:</b>	<b>Signature:</b>

### \*\*\* OFFICE USE ONLY \*\*\*

<b>Date Received:</b>	<b>TMA Project #:</b>	

**Return to:** For most current version of form, please visit Facilities website. **Address:**

<b>Electronically:</b> Scan completed form and send to: <a href="mailto:piw@unt.edu">piw@unt.edu</a>	<b>Facsimile:</b> (940) 369-7447 Attn: Gail Henderson	<b>Inter-departmental Mail:</b> Facilities - Main Office Attn: Gail Henderson
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# UNIVERSITY OF NORTH TEXAS™

OFFICE OF FACILITIES MANAGEMENT & CONSTRUCTION

ph: (940)565-4974 | fax: (940)565-4650 | <http://www2.facilities.unt.edu/depts/fmc>

## PRELIMINARY REQUEST [for] ESTIMATE

Rev. 06/2009

**Purpose of Form:** To request a general price point for the scope of work described to better identify funding issues.

**This form does NOT replace the Project Initiation Worksheet (PIW),** but rather comes before it to provide departments with generic pricing information for preliminary budgeting purposes before requesting a project to be implemented (through the completion of the PIW form).

**When to use:** When a department has an idea for a project to develop, but the associated costs need to be understood before further resources can be dedicated to implementing the project idea.

**NOTE:** *The estimate prepared for you by UNT Facilities as a result of this form is NOT based on formal pricing from contractors. It is to be used for preliminary budgeting purposes only. Once a PIW is received, a formal estimate will be prepared which will be a Guaranteed Price.*

### CONTACT INFORMATION

**Authored Date:**

**Requesting Department:**

**Project Contact Info:** (Identify one person with whom Facilities can work with on this request)

Name:

Phone:

E-mail:

### PROJECT DETAILS

**Building:**

**Room Number(s):** (use commas)

If not within a building, describe location below:

**General Information: (check all that apply)**

Structural Remodel  
(move walls, doors, etc.)

Furnishings

Box Move

Building System  
Remodel (power,  
voice/data, A/C, etc.)

Space Efficiency  
Study (room layout,  
storage needs, etc.)

Finishes (e.g carpet/paint)

System Furniture

Equipment

**Desired Estimate  
Completion Date:**

**Scope of work requested (be as descriptive as possible):**

### APPROVAL SECTION

**Department Head/Manager Approval**

**Name:**

**Date:**

**Signature:**

**Dean/Director Approval**

**Name:**

**Date:**

**Signature:**

**Return completed form using one of three methods:**

**Electronically:**

Scan completed form and send to:

[piw@unt.edu](mailto:piw@unt.edu)

**Facsimile:**

(940) 565-4650

Attn: Peter Palacios

**Inter-departmental Mail:**

Facilities - Main Office

Attn: Peter Palacios

Send questions to [piw@unt.edu](mailto:piw@unt.edu). Visit our web site for detailed information about projects: <http://www2.facilities.unt.edu/depts/fmc>

For most current version of form, please visit Facilities website.



# PROJECT CHECKLIST

Project Name: \_\_\_\_\_

PROGRAMMING / DESIGN DEVELOPMENT	DESIGN REVIEW / ESTIMATE
<input type="checkbox"/> SAC APPROVAL	<input type="checkbox"/> INVITATION TO REVIEW - DESIGN REVIEW SIGN-IN TO INDICATE DELIVERY METHOD
<input type="checkbox"/> ASBESTOS CHECK	<input type="checkbox"/> PM TO SUBMIT REMEDY TICKET & REQUEST ESTIMATE FROM CITC (SEND MATRIX)
<input type="checkbox"/> MEP AS-BUILTS PRINTED/SAVED INTO DRAWING FOLDER	<input type="checkbox"/> REQUEST ABATEMENT/AIR MONITORING PROPOSALS (REFERENCE PROCEDURE)
<input type="checkbox"/> ADA ANALYSIS - OVER \$45K REQUIRES TAS REVIEW LINE ITEM IN ESTIMATE	<input type="checkbox"/> INCORPORATE MARK-UPS FROM DESIGN REVIEW INTO FINAL SET
<input type="checkbox"/> FIRE/LIFE SAFETY ANALYSIS - PRELIM EST BASED ON EMAIL SCOPE FROM PM	<input type="checkbox"/> SUBMIT FINAL SET FOR PRICING (PKG = PDF CD SET, PDF AS-BUILTS, PATH TO EST.)
<input type="checkbox"/> ROOM NUMBER ASSIGNMENT (HELEN BAILEY)	<input type="checkbox"/> OBTAIN CLIENT SIGNATURE ON DRAWINGS AND FF&E PACKAGE
<input type="checkbox"/> DESIGN GUIDELINE COMPLIANCE	<input type="checkbox"/> SUBMIT FINAL PKG TO H.BAILEY, J.BROWN, & T.RYLES FOR REVIEW
<input type="checkbox"/> MOVE MATRIX COMPLETED BY CLIENT	<input type="checkbox"/> SUBMIT PKG FOR TAS REVIEW PROPOSAL (>\$50K) & SUBMIT TDLR FORMS
	<input type="checkbox"/> SUBMIT ESTIMATE TO CLIENT FOR REVIEW/APPROVAL

CONSTRUCTION	
<i>IN-HOUSE</i>	<i>JOB ORDER CONTRACT</i>
<input type="checkbox"/> PM: REQUEST FOR FUNDING WITHDRAWAL	<input type="checkbox"/> PM: REQUEST FOR FUNDING WITHDRAWAL
<input type="checkbox"/> PM: REQUEST WO TO FIRE SYSTEMS	<input type="checkbox"/> PM: REQUEST WO'S FOR IN-HOUSE WORK (FIRE SYSTEMS, DOOR SYSTEMS, ETC.)
<input type="checkbox"/> PM: REQUEST SITE VISIT W/FIRE SUB(S) & UNT FIRE SYSTEMS - OBTAIN PROPOSAL	<input type="checkbox"/> PM: REQUEST SITE VISIT W/FIRE SUB(S) & UNT FIRE SYSTEMS - OBTAIN PROPOSAL
<input type="checkbox"/> PM: REQUEST PO'S FOR EXTERNAL TRADES (GSF, TOTAL, ETC.)	<input type="checkbox"/> PM: REQUEST IAQ NOTIFICATION FROM RMS
<input type="checkbox"/> PM: SCHEDULE INITIAL SYSTEM TEST (FIRE)	<input type="checkbox"/> PM: CONFIRM MOVE MATRIX AND NOTIFY CITC THAT PROJECT IS APPROVED
<input type="checkbox"/> SUPERINTENDENT: REQUEST IAQ NOTIFICATION FROM RMS	<input type="checkbox"/> PM: REQUEST FIRE SAFETY SUBCONTRACTOR QUALIFICATIONS FOR REVIEW
<input type="checkbox"/> PM: CONFIRM MOVE MATRIX WITH CLIENT - SUBMIT ANY REVISIONS TO CITC	<input type="checkbox"/> LH/MR/MM: COORDINATE ABATEMENT/AIR MONITORING
<input type="checkbox"/> SUPERINTENDENT: NOTIFY CITC THAT PROJECT IS APPROVED	<input type="checkbox"/> PM: SUBMIT DWGS TO JOC FOR BIDS - ANYTHING >\$25K REQUIRES BONDING!!!
<input type="checkbox"/> LH/MR/MM: COORDINATE ABATEMENT/AIR MONITORING	<input type="checkbox"/> PM: SUBMIT JOC ESTIMATE TO HB FOR REVIEW (MEANS FORMAT)
<input type="checkbox"/> SUPERINTENDENT: SUBMIT WO'S FOR IN-HOUSE WORK	<input type="checkbox"/> PM: REQUEST PO'S FOR JOC AND EXTERNAL TRADES (GSF, TOTAL, ETC.)
<input type="checkbox"/> PM: FIRE SAFETY SUBMITTAL PKG TO UNT FIRE SYSTEMS FOR REVIEW/APPROVAL	<input type="checkbox"/> PM: SCHEDULE INITIAL SYSTEM TEST (FIRE)
<input type="checkbox"/> PM: PLACE FF&E ORDERS (CALL FOR ETA 7-10 DAYS AFTER PO DISPATCH)	<input type="checkbox"/> PM: FIRE SAFETY SUBMITTAL PKG TO UNT FIRE SYSTEMS FOR REVIEW/APPROVAL
<input type="checkbox"/> PM: SCHEDULE TAS WALK-THRU (>\$50K)	<input type="checkbox"/> PM: CONFIRM BONDING IS IN PLACE PRIOR TO RELEASE OF PO TO JOC
<input type="checkbox"/> PM: SCHEDULE PRE-CON MEETING (USE PRE-CON EMAIL GROUP LIST)	<input type="checkbox"/> PM: PLACE ORDERS FOR FF&E (CALL FOR ETA 7-10 DAYS AFTER PO DISPATCH)
<input type="checkbox"/> SUPERINTENDENT: PROVIDE CONSTRUCTION SCHEDULE TO PM	<input type="checkbox"/> PM: SCHEDULE TAS WALK-THRU (>\$50K)
<input type="checkbox"/> PM: PROVIDE SCHEDULE TO CITC/FIRE SAFETY; CONVEY TO CLIENTS	<input type="checkbox"/> PM: SCHEDULE PRE-CON MEETING (USE PRE-CON EMAIL GROUP LIST)
<input type="checkbox"/> SUPERINTENDENT: CONFIRM PROPER CONTAINMENT OF JOB SITE WITH RMS	<input type="checkbox"/> JOC: PROVIDE CONSTRUCTION SCHEDULE TO PM
<input type="checkbox"/> SUPERINTENDENT: COORDINATE INSPECTIONS AS NEEDED (COPY OF FORM TO PM)	<input type="checkbox"/> PM: PROVIDE SCHEDULE TO CITC/FIRE SAFETY; CONVEY TO CLIENTS
<input type="checkbox"/> PM: PHOTOGRAPH JOB SITE PERIODICALLY THROUGHOUT PROJECT	<input type="checkbox"/> PM: PRIOR TO START OF CONSTRUCTION, CONFIRM PROPER CONTAINMENT WITH RMS
<input type="checkbox"/> PM: INITIATE PRE-TEST OF FIRE SYSTEM 3-5 DAYS BEFORE FINAL TEST	<input type="checkbox"/> PM: COMPLETE PROJECT INSPECTIONS AS NEEDED (COORDINATE WITH S. KIRKPATRICK)
<input type="checkbox"/> SUPERINTENDENT: INITIATE FINAL PUNCH-LIST	<input type="checkbox"/> PM: PHOTOGRAPH JOB SITE PERIODICALLY THROUGHOUT PROJECT
<input type="checkbox"/> PM: EMAIL CAD DEPT FOR AS-BUILT CHECK	<input type="checkbox"/> PM: INITIATE PRE-TEST OF FIRE SYSTEM 3-5 DAYS BEFORE FINAL TEST
<input type="checkbox"/> PM: COORDINATE FINAL SYSTEM TEST (FIRE) AND OBTAIN AS-BUILTS FROM SUB	<input type="checkbox"/> PM: INITIATE FINAL PUNCHLIST; EMAIL CAD DEPT FOR AS-BUILT CHECK
<input type="checkbox"/> PM: COORDINATE FINAL TAS INSPECTION	<input type="checkbox"/> PM: COORDINATE FINAL SYSTEM TEST (FIRE) AND OBTAIN AS-BUILTS FROM SUB
<input type="checkbox"/> MR/LH: OBTAIN FINAL ASBESTOS REPORTS	<input type="checkbox"/> PM: COORDINATE FINAL TAS INSPECTION
<input type="checkbox"/> PM: HAVE CLIENT SIGN CERTIFICATE OF OCCUPANCY AT MOVE-IN	<input type="checkbox"/> PM: OBTAIN FINAL ASBESTOS REPORTS IF APPLICABLE; SUBMIT TO LH/MR/MM
	<input type="checkbox"/> PM: HAVE CLIENT SIGN CERTIFICATE OF OCCUPANCY AT MOVE-IN

PUNCH LIST / CLOSEOUT	
<input type="checkbox"/> PM TO SEND CLIENT CUSTOMER SERVICE SURVEY VIA EMAIL	<input type="checkbox"/> ATTACH QUOTES/INVOICES TO CORRESPONDING PO'S
<input type="checkbox"/> MOVE CAD FILE INTO FINAL SUBMITTAL FOLDER	<input type="checkbox"/> SEND FINAL COMPLETION EMAIL
<input type="checkbox"/> CONFIRM ROOM NUMBERS; SEND RM NO. CHANGES EMAIL AND TAG ROOMS IN FIMS	<input type="checkbox"/> FILE ALL PROJECT EMAILS ELECTRONICALLY AND IN PAPER FILE
<input type="checkbox"/> EMAIL FINISH PLAN (A4) TO KEITH COOK	<input type="checkbox"/> ARCHIVE ELECTRONIC AND PAPER FOLDERS
<input type="checkbox"/> CONFIRM ALL INVOICES RECEIVED/PAID	

**KEY**

- COMPLETED
- REQUESTED
- NO ATTEMPT



# UNIVERSITY OF NORTH TEXAS™

OFFICE OF FACILITIES MANAGEMENT & CONSTRUCTION

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## FIELD VERIFICATION CHECKLIST

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CHECK BY: [CLICK HERE TO ENTER TEXT.](#)

PROJECT NAME / LOCATION: [Click here to enter text.](#)

DATE: 4/16/09

- |                          |                      |                          |              |
|--------------------------|----------------------|--------------------------|--------------|
| <input type="checkbox"/> | Ceiling Height _____ | <input type="checkbox"/> | Photos taken |
|--------------------------|----------------------|--------------------------|--------------|
- 
- Verify wall layout
    - Overall room dimensions
    - Column placement
    - Window placement
  
  - Verify doors
    - Door location, height, and width
    - **Door finish**
    - **Door hardware type**
    - Door swing
    - **Frame type (hollow metal vs. redi-frame)\***
    - Lite kits / Sidelites
    - \* **Note: If not all doors are one or the other, note on plans what type of frame is at each door within the project scope**
  
  - Verify power / telecomm layout
    - Location
    - Type of receptacle (duplex, quad, isolated, dedicated, voice, data)
    - Number of jacks per receptacle (voice / data)
    - Height of receptacles (if not mounted at standard height)
    - \* **Note: Please indicate if tele/data need to be updated**
  
  - Verify ceiling layout
    - Ceiling type (hard ceiling, grid & tile) and size (2x2, 2x4, 16x20)
    - **Locate grid starting point (note starting point in each area where grid is not continuous)**
    - Location of light fixtures (including 24-hour / emergency lights)
    - Location of HVAC returns and supplies
    - Location of sprinkler heads
    - Note additional ceiling fixtures (speakers, alarms, etc.)
    - Note location of light switches and temperature sensors
    - **Note on plans the ceiling height in each area where grid is not continuous**
  
  - Verify finishes
    - Carpet type (broadloom or tile), color, and condition
    - Rubber base color and type (cove or straight)
    - Paint color(s) in space (note any accent walls)
    - Note location and color of VCT in space
    - Note any special finishes
  
  - Special conditions
    - Location and quantity of adjustable shelving
    - Note any special conditions that may affect construction
- 
-

# University of North Texas

## Electronic Files Disclaimer

The attached electronic files are the property of University of North Texas and should be used solely for the work authorized by and executed on behalf of the University. Any changes made to CAD plans /maps should be made in conformance with the University's CAD standards (which are available upon request), and are to be considered the property of the University of North Texas under the terms of any contract or agreement executed between your firm and UNT.

In providing these plans/maps to you, the University does not vouch for the accuracy of scale, content, or layout. UNT attempts to provide the best available information, but many plans/maps are based on information which may or may not reflect all recent renovations or modifications to a building/site or to University or municipal utility infrastructures serving the campuses. Consequently, plans/maps should not be used for design without first being field measured and verified.



UNIVERSITY OF NORTH TEXAS  
 OFFICE OF FACILITIES MANAGEMENT AND CONSTRUCTION

MOVE MATRIX

**[DEPARTMENT NAME]**

**\*\*\* NOTE: After filling out as much information as possible, please forward to your Network Support Manager for review and comment prior to submitting to Facilities. \*\*\***

Employee Information			Current Location			New Location			Tele/Data Information			Move Date	Dept. Contact	Telecomm./Power Notes	
Department	Last Name	First Name	Building	Floor	Room	Building	Floor/Room	Building	Floor/Room	Phone Number	Private Fax and/or Modem	LAN/Printer	Week Of		Notate any special telecommunications / power needs
ECON	Uminski	Harvey	WH	3rd	325	ETECH	2 / 254	ETECH	2 / 283F	2573	1 fax	3 lan printers	5/6/2004	Steve Cobb	
ECON	Rous	Jeffrey	WH	3rd	338	ETECH	2 / 283F	ETECH	2 / 220H	4545			5/6/2004	Steve Cobb	2 computer drops
ECON	Kim	Young Sr	WH	3rd	n/a	ETECH	2 / 220H	ETECH	2 / 220A	2220		2 lan printers	5/6/2004	Steve Cobb	3 computer drops
ECON			WH	3rd		ETECH	2 / 220A	ETECH	2 / 220A				5/6/2004	Steve Cobb	



**UNIVERSITY OF NORTH TEXAS**  
OFFICE OF FACILITIES MANAGEMENT AND CONSTRUCTION

**DESIGN REVIEW SIGN-IN**

Project Manager:

Project Name:

Review Dates:

Delivery Method:  In-House  JOC Initials:

NAME	SIGNATURE	DATE
Bailey, Helen	_____	_____
Barkenhausen, David	_____	_____
Brown, Jeff	_____	_____
Cook, Keith	_____	_____
Davis, Ron	_____	_____
Hutson, Lynda	_____	_____
Hutson, Tom	_____	_____
Jones, Tommy	_____	_____
Kirkpatrick, Sharon	_____	_____
Lara, Sheri	_____	_____
Mathis, Steve	_____	_____
McCormick, Rick	_____	_____
Milan, Dick	_____	_____
Montalvo, Silvester	_____	_____
Moran, Rod	_____	_____
Morrow, Dowl	_____	_____
Repka, Ron	_____	_____
Ryles, Tessa	_____	_____
Salsman, Randy	_____	_____
Sedgely, Ken	_____	_____
Stippecc, Vincent	_____	_____
Wiedower, Keith	_____	_____
Young, David	_____	_____





**Facilities**

Main: (940) 565.2751 | Fax: (940) 565.4650  
https://www2.facilities.unt.edu/

**PROJECT BUDGET**

**DISCOVERY PARK B131 RENOVATIONS**

**TMA - Project #** 11004  
**Project Manager** Lacey Almager  
**Superintendent**

**Department** Dean's College of Engineering  
**Deptid** 62328

**Project Start** 7/30/09  
**Project Deadline**

**Bldg** Discovery Park  
**Rm/Area** B131

ITEM NO.	ITEM DESCRIPTION	UNIT	QTY	UNIT COST	ITEM SUBTOTAL	PROJECT SUBTOTALS	
<b>ABATEMENT</b>							
	<i>Abatement Charges</i>					\$0.00	
					\$0.00		
					\$0.00		
					\$0.00		
					SUBTOTAL	\$0.00	
					CONTINGENCY@	10% \$0.00	
					ESCALATION@	0% \$0.00	
<b>ABATEMENT SUBTOTAL</b>						<b>\$0.00</b>	

<b>DEMOLITION/CONSTRUCTION</b>						
<b>Structural</b>						
1	Demolition of existing VCT and rubber base	sq.ft.	565	1.5	\$847.50	
2	Demolition of all existing chair rail in room	lin.ft.	30	1.5	\$45.00	
3	Demolition of wall section for door	sq.ft.	50	3.5	\$175.00	
4	Remove door, frame and hardware to relocate	ea.	1	350	\$350.00	
5	New gyp partition (9' H, 2-sided)	lin.ft.	40	125	\$5,000.00	
6	Install frosted film on windows to 7' AFF	hist. sq.ft.	98	3.5	\$343.00	
7	Install new doors, frames, and hardware	ea.	2	1200	\$2,400.00	
8	Install carpet	sq.yd.	75	45	\$3,375.00	
9	Install rubber base	box	2	150	\$300.00	
10	Relocate salvaged door, frame, and hardware	ea.	1	750	\$750.00	
11	Construct and Install base cabinet unit	rsm lin.ft.	8	136	\$1,088.00	
12	Patch and Paint, 2 coats, throughout suite	sq.ft.	1450	1.5	\$2,175.00	
13	Construct and Install Standards and Shelving	lin.ft.	16	20	\$320.00	
14	Repair ceiling tiles as necessary	job	1	120	\$120.00	
15	Provide/install countertop/backsplash	rsm lin.ft.	8	39.1	\$312.80	
						<b>\$17,168.50</b>
<b>Electrical</b>						
1	Re-switching to dual	ea.	6	150	\$900.00	
2	New outlets	ea.	3	150	\$450.00	
3	New quad Outlet	ea.	1	150	\$150.00	
4	New Dedicated Outlet	ea.	1	350	\$350.00	
5	New Lights (2x4)	ea.	2	100	\$200.00	
6	Relocated existing electrical outlets(Quad)	ea.	3	150	\$450.00	
7	Relocated existing electrical outlets	ea.	3	150	\$450.00	
8	Install wire mold on storefront	lin.ft.	8	30	\$240.00	
						<b>\$0.00</b>
<b>Plumbing</b>						
						<b>\$3,190.00</b>
						<b>\$0.00</b>
						<b>\$0.00</b>
						<b>\$0.00</b>
						<b>\$0.00</b>
						<b>\$0.00</b>
<b>Mechanical</b>						
						<b>\$0.00</b>
1	Allowance (including 1 new VAV box) Materials & labor to install	job	1	3500	\$3,500.00	
						<b>\$0.00</b>
						<b>\$0.00</b>
						<b>\$0.00</b>
						<b>\$0.00</b>

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PROJECT BUDGET

						\$3,500.00
1	Allowance	job	1	100	\$100.00	
					\$0.00	
					\$0.00	
					\$0.00	
					\$0.00	
<b>Fire &amp; Life Safety</b>						\$100.00
1	Great Southwestern Fire	job	1	3500	\$3,500.00	
2	Total Fire and Safety (Sprinklers)	job	1	1655	\$1,655.00	
3	Building inspections	mh	2	70	\$140.00	
4	F/LS Inspection	mh	6	45	\$270.00	
<b>Access Control</b>						\$5,565.00
1	Allowance	job	1	40	\$40.00	
					\$0.00	
					\$0.00	
					\$0.00	
					\$0.00	
SUBTOTAL						\$40.00
CONTINGENCY@						5% \$1,478.18
ESCALATION@						0% \$0.00
<b>DEMOLITION / CONSTRUCTION SUBTOTAL</b>						<b>\$31,041.68</b>
<b>FURNITURE</b>						
1	Furniture for 2 private offices (Wilson)	job	1	6,069.94	\$6,069.94	
2	Office Furnishings (BKM)	job	1	5,168.02	\$5,168.02	
3	Accessories - Humanscale	job	1	1,298.22	\$1,298.22	
						\$0.00
SUBTOTAL						\$12,536.18
CONTINGENCY@						5% \$626.81
ESCALATION@						0% \$0.00
<b>FURNITURE SUBTOTAL</b>						<b>\$13,162.99</b>
<b>MOVING CHARGES</b>						
1	Berger-Allied				\$0.00	
					\$0.00	
					\$0.00	
					\$0.00	
SUBTOTAL						\$0.00
CONTINGENCY@						10% \$0.00
ESCALATION@						0% \$0.00
<b>MOVING SUBTOTAL</b>						<b>\$0.00</b>
<b>TELECOMM / DATACOMM</b>						
1	Telecomm Charges	job	1	3700	\$3,700.00	
2	Datacomm Charges				\$0.00	
					\$0.00	
						\$0.00
SUBTOTAL						\$3,700.00
CONTINGENCY@						10% \$370.00
ESCALATION@						0% \$0.00
<b>TELECOMM / DATACOMM SUBTOTAL</b>						<b>\$4,070.00</b>
<b>PROFESSIONAL SERVICES</b>						
1	BHB	job	1	5,603.60	\$5,603.60	
					\$0.00	
SUBTOTAL						\$5,603.60
<b>PROFESSIONAL SERVICES SUBTOTAL</b>						<b>\$5,603.60</b>

Facilities

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https://www2.facilities.unt.edu/

PROJECT BUDGET

**DISCOVERY PARK B131 RENOVATIONS**

**TMA - Project #** 11004  
**Project Manager** Lacey Almager  
**Superintendent** 0

**Department** Dean's College of Engineering  
**Deptid** 62328

**Project Start** 7/30/09  
**Project Deadline** 1/0/00

**Bldg** Discovery Park  
**Rm/Area** B131

ITEM NO.	DESCRIPTION	PROJECT SUBTOTALS
2	Asbestos Abatement	\$0.00
3	Demolition & Construction	\$31,041.68
4	Furniture	\$13,162.99
5	Moving Services	\$0.00
6	Telecomm / Datacomm	\$4,070.00
7	Project Subtotal	\$48,274.66
8	Project management and administration charge	12.0% \$5,792.96
9	Professional Services (if applicable)	\$5,603.60
<b>PROJECT TOTAL</b>		<b>\$59,671.22</b>

**Notice to Proceed:**

This estimate was prepared for you by UNT Facilities and is based on formal pricing from contractors. Once the budget estimate is approved, your signature is taken as a Notice to Proceed. Facilities will guarantee the total project cost as a not to exceed price. Any client requested changes to the scope after this point will constitute a change order and will be added to the price. 100% of the total project cost will be transferred within 5 days after signature. Work will start when funds are in place. Please note that any furnishings and/or equipment purchased is non-returnable and non-refundable once the order has been placed.

DeptID Holder Signature: \_\_\_\_\_

DeptID Holder Name: \_\_\_\_\_

DeptID Holder Title: \_\_\_\_\_

DATE: \_\_\_\_\_

All budget estimates must also be reviewed and approved by the Office of Financial Planning & Budget. It is the requesting department's responsibility to obtain this signature of approval prior to submitting the completed budget estimate form to Facilities for action.

Mark these forms "Attention: Budget Office"

Fax to ext. 4913, mail to Admin 102

Send scans to Budget.Office@unt.edu

Signature: \_\_\_\_\_

Printed Name and Title: \_\_\_\_\_

DATE: \_\_\_\_\_

Call ext. 3233 for Budget Office assistance

PROJECT BUDGET

DISCOVERY PARK B131 RENOVATIONS

**TMA - Project #** 11004  
**Project Manager** Lacey Almager  
**Superintendent**

**Department** Dean's College of Engineering  
**Deptid** 62328

0

**Project Start** 7/30/09  
**Project Deadline** 1/0/00

**Bldg** Discovery Park  
**Rm/Area** B131

SUMMARY OF SCOPE

**Abatement**

1 None in scope of work

**Structural**

- 1 Demolition of existing VCT and rubber base
- 2 Demolition of all existing chair rail in room
- 3 Demolition of wall section
- 4 Remove existing mirror in space
- 5 Remove door, frame and hardware to relocate
- 6 New gyp partition (9' H, 2-sided)
- 7 Install frosted film on windows to 7' AFF
- 8 Install new doors, frames, and hardware
- 9 Install carpet
- 10 Install rubber base
- 11 Relocate salvaged door, frame, and hardware
- 12 Construct and Install base cabinet unit
- 13 Patch and paint, 2 coats, throughout suite
- 14 Construct and install standards and shelving
- 15 Repair ceiling tiles as necessary
- 16 Provide/install countertop/backsplash

**Electrical**

- 1 Reswitching to dual
- 2 New outlets
- 3 New quad Outlet
- 4 New Dedicated Outlet
- 5 New Lights (2x4)
- 6 Relocated existing electrical outlets(Quad)
- 7 Relocated existing electrical outlets
- 8 Install wiremold on storefront

**Plumbing**

1 None in scope of work

**Mechanical**

- 1 Allowance (including 1 new VAV box)
- 2 Replace "slot" diffusers with lay-in Diffusers

**Signage**

1 Allowance

**Fire & Life Safety**

- 1 Great Southwestern Fire
- 2 Total Fire and Safety (Sprinklers)

**Access Control**

- 1 Allowance
- 2 Building inspections
- 3 F/LS Inspection

**Furniture**

- 1 Furniture for 2 private offices (Wilson)
- 2 Office Furnishings (BKM)
- 3 Accessories - Humanscale

**Moving Charges**

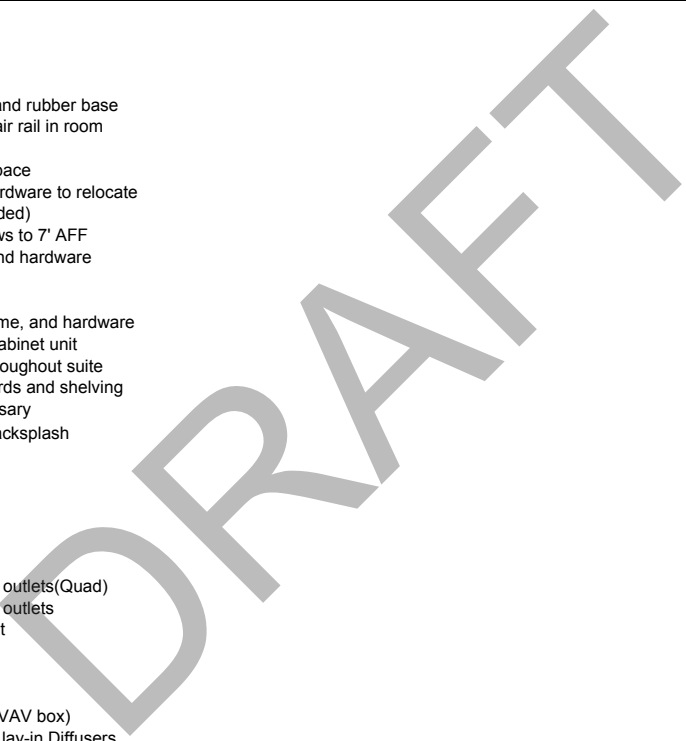
1 None in scope of work

**Telecomm /Datacomm**

1 Telecomm Charges

**Professional Services**

1 BHB





# UNIVERSITY OF NORTH TEXAS™

OFFICE OF FACILITIES MANAGEMENT & CONSTRUCTION

## SUBMITTALS ROUTING SHEET

**SUBMITTAL NAME:**  
**SUBMITTAL NUMBER:** 10833\_S-  
**PROJECT:** Chestnut 155 (TMA 10833)  
**SENDER:** Tessa Ryles  
**DATE:** 5/26/2010

**HELEN BAILEY**

\_\_\_\_\_  
(SIGNATURE) (DATE)

APPROVED  APPROVED AS CORRECTED  NOT APPROVED  REVISE & RESUBMIT

**JEFF BROWN**

\_\_\_\_\_  
(SIGNATURE) (DATE)

APPROVED  APPROVED AS CORRECTED  NOT APPROVED  REVISE & RESUBMIT

(PRINTED NAME)

\_\_\_\_\_  
(SIGNATURE) (DATE)

APPROVED  APPROVED AS CORRECTED  NOT APPROVED  REVISE & RESUBMIT

(PRINTED NAME)

\_\_\_\_\_  
(SIGNATURE) (DATE)

APPROVED  APPROVED AS CORRECTED  NOT APPROVED  REVISE & RESUBMIT

(PRINTED NAME)

\_\_\_\_\_  
(SIGNATURE) (DATE)

APPROVED  APPROVED AS CORRECTED  NOT APPROVED  REVISE & RESUBMIT

COMMENTS: **PLEASE RETURN WITHIN 24 HOURS. THANKS, TR**

# UNIVERSITY OF NORTH TEXAS™

## KEY REQUEST FORM

**UNT Facilities**  
**Door Systems Office**  
 307 S. Avenue B, Suite 006

Phone: (940) 565-4888  
 Fax: (940) 369-7158  
 Fax: (940) 369-8973

<b>Last Name:</b>	<b>First Name:</b>	<b>Mi.:</b>
<b>UNT ID #:</b>	<input type="checkbox"/> Faculty <input type="checkbox"/> Staff <input type="checkbox"/> Student <input type="checkbox"/> Other	
<b>Keyholder Phone:</b>	<b>Keyholder Email:</b>	

Department							Door Systems Office	
	Building Name	Room Number	Dept. #	Acct#/ DeptID	Authorizer Signature	Date	Issue #	Keycode
1								
2								
3								
4								
5								
<b>Authorizer Printed Name</b>					<b>Authorizer Email</b>		<b>Authorizer Phone</b>	

**Note: All of the Above Information is Required.**

### IMPORTANT NOTICE!

All keys are the property of the University and shall not be loaned, borrowed or transferred without Door Systems approval. Keys lost or stolen shall be reported to the Door Systems Office as soon as possible.

### KEYHOLDER'S AGREEMENT

By my signature below, I agree to all the following terms:

1. The key described herein remains the property of the State of Texas and UNT Door Systems.
2. This key is entrusted to me for my exclusive use - I will not duplicate it, loan it, exchange it, or otherwise allow its use or possession by any other person.
3. I will report its loss, theft or destruction immediately to my department and to Door Systems.
4. If this key becomes lost, stolen or otherwise not available for return, I will pay the key replacement fee.
5. When I terminate employment or no longer need this key, or upon demand from Door Systems, I will return it promptly, in person, and ONLY to the UNT Door Systems Office. If I do not return this key, I agree to all the following terms:
  - a. I will pay the current key replacement fee;
  - b. I will, if required, pay the cost for rekeying all affected locks;
  - c. Processing of payment of my retirement refund and other entitlements may be delayed;
  - d. My grades may be blocked;
  - e. A disciplinary reprimand may be entered in my permanent personnel record;
  - f. The University may bring civil or criminal proceedings against me for theft of state property.

**Note: The original form shall be sent to Door Systems and copies retained by the department and the keyholder.**

<b>Keyholder's Signature:</b>	For most current version of form, please visit <a href="#">Facilities website.</a>	<b>Date:</b>
-------------------------------	--	--------------



# UNIVERSITY of NORTH TEXAS

## TEMPORARY KEY REQUEST FORM

**FACILITIES**  
**Access Control Office**  
**2204 West Prairie**

**Voice Mail: 565-4888**  
**Fax: 369-7158**  
**Fax: 369-8973**

<b>Requester's Last Name:</b>	<b>Requester's First Name:</b>	<b>Requester's Social Security #:</b>
<b>Name of Company or Department:</b>		<b>Expected Return Date:</b>
<b>Contact Person:</b>		<b>Phone Number:</b>

Department					Access Control Office		
Building Name	Room Number	Dept. Number	Authorizer Signature	Date	Issue #	Keycode	Date
1.							
2.							
3.							
4.							
5.							

**IMPORTANT NOTICE!**

In signing this form, the UNT employee takes responsibility for the key(s) and for its return. Said employee may, in turn, give custody of the key to an outside party (i.e., contractor, vender, etc.). However, if the key is lost or not returned for any reason, the employee who authorized the temporary key request will be subject to the actions described in the section below.

**KEYHOLDER'S AGREEMENT**

By my signature below, I agree to all the following terms:

1. The key described herein remains the property of the State of Texas and UNT Access Control.
2. This key is entrusted to me – I will not duplicate it, loan it, exchange it, or otherwise allow its use or possession by any person other than the user listed above.
3. I will report its loss, theft or destruction immediately to my department and to Access Control.
4. If this key becomes lost, stolen or otherwise not available for return, I will pay the key replacement fee.
5. When the key is no longer need by the outside party as identified above, or upon demand from Access Control, I will return it promptly, in person, and ONLY to the UNT Access Control Office. If I do not return this key, I agree to all the following terms:
  - a. I will pay the current key replacement fee;
  - b. I will, if required, pay the cost for re-keying all affected locks;
  - c. Processing of payment of my retirement refund and other entitlements may be delayed;
  - d. A disciplinary reprimand may be entered in my permanent personnel record;
  - e. The University may bring civil or criminal proceedings against me for theft of state property.

**Note:** The original form shall be sent to Access Control and copies retained by the department and the keyholder.

<b>Keyholder's Signature:</b>	<b>Date:</b>
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For most current version of form, please visit Facilities website.

DRAFT

# UNIVERSITY OF NORTH TEXAS™

FACILITIES PURCHASING

## CONTRACT COMPLETION INSPECTION REPORT

Rev. 06/2009

Upon receiving notification from the Contractor that the specified work has been completed, or from Purchasing that an invoice has been received, the responsible individual will inspect the work, including job site clean-up, complete this form and forward it to Facilities Purchasing. Purchasing will not certify payment for contract work until this form has been satisfactorily completed and the responsible individual has certified payment should be made.

Failure to respond to Facilities Purchasing on requests received from Purchasing and Payment Services in a timely fashion (i.e. within two (2) working days) will cause the invoice to be paid without consent.

TMA Project Number: \_\_\_\_\_ Purchase Order Number: \_\_\_\_\_

Amount of Payment: \$ \_\_\_\_\_

Contractor: \_\_\_\_\_

Location and  
Description of Work:

Start Date: \_\_\_\_\_ Completion Date: \_\_\_\_\_

- Work completed as specified. Certified for payment.
- Work is not complete. (See Comments section below)
- Work has deficiencies. (See Comments section below)

Comments: Record work yet to be completed or deficiencies noted and action taken to have corrected. After work has been completed or corrections have been made, update this form or complete another copy to show satisfactory completion and authorize payment.

For most current forms, visit P:\Fac\Fmc\PROJECTS Directory\\_TEMPLATE FOLDER (copy don't move)\Floor\11xxx\_Name\Forms

Signature of Responsible Individual

78

**DRAFT**

Date





# UNIVERSITY OF NORTH TEXAS™

OFFICE OF FACILITIES MANAGEMENT & CONSTRUCTION

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## INVOICE ROUTING SHEET

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**PROJECT:** CLICK HERE TO ENTER TEXT.

**VENDOR:** CLICK HERE TO ENTER TEXT.

**FROM:** CHOOSE AN ITEM.

**DATE:** 5/26/2010

- To:**
1.  Helen Bailey (all invoices)
  2.  Charles Jackson (invoices over \$10,000)
  3.  Lynda Hutson (invoices on blanket PO's) – COPY ONLY
  3.  Denise Harpool
  4.  Sue Hull  
 Sherry Cook
  5.  Other: \_\_\_\_\_

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**COMMENTS:** PLEASE RETURN A COPY OF THE SIGNED INVOICE WITH ALL SIGNATURES TO THE PROJECT MANAGER PRIOR TO ROUTING TO SHERRY COOK / SUE HULL.

# UNIVERSITY OF NORTH TEXAS™

## CONSTRUCTION INSPECTION REPORT

UNT Facilities  
1155 Union Circle #311040  
Denton, TX 76203-5017  
Office: (940) 565.2751 | Fax (940) 565.4650

Date: \_\_\_\_\_

Inspection Code: \_\_\_\_\_  
(use back of form)

Check here if this is a re-inspection

### Project Information

### Inspection Information

Project Name: _____	Inspector: _____
Parent Work Order: _____	Contractor: _____
Description of Work: _____	Representative: _____
Project Location: _____	Phone: _____
Project Manager: _____	
Office phone: _____	
Cell phone: _____	

### Inspection Results

<input type="checkbox"/> Approved	<input type="checkbox"/> Conditionally approved (see comments)	<input type="checkbox"/> Work incomplete	<input type="checkbox"/> Stop Work Order
<input type="checkbox"/> Prior violations: <input type="radio"/> Corrected <input type="radio"/> Not corrected	<input type="checkbox"/> Failed Inspection: <input type="radio"/> <b>Re-inspection Required</b>		

Comments: \_\_\_\_\_

Inspector:  
Printed Name: \_\_\_\_\_  
Signature: \_\_\_\_\_

Contractor Representative:  
Printed Name: \_\_\_\_\_  
Signature: \_\_\_\_\_

# UNT Facilities Construction Inspection Report Inspection Codes

CIVIL / SITE INSPECTIONS	
Code	Description
C-1	Paving - Steel Reinforcing & Form
C-2	Retaining Walls (provide engineering design)
C-3	Temporary Power Pole
C-4	Temporary Utilities - Electric Meter
C-5	Temporary Utilities - Gas Meter
C-6	Irrigation Controls
C-7	Site Drainage
C-8	Final - Fencing
C-9	Final - Interior/Exterior
C-10	Other: _____

ARCHITECTURAL INSPECTIONS	
Code	Description
A-1	Piers / Foundation
A-2	Foundation - Steel Reinforcing & Form
A-3	Drywall
A-4	Framing
A-5	Above Ceiling (before tile)
A-6	Roof Drains
A-7	Exterior Sheathing / Insulation
A-8	Other: _____

ELECTRICAL INSPECTIONS	
Code	Description
E-1	Electrical Rough-in
E-2	Electrical Above Ceiling (before ceiling tile)
E-3	Underground Electrical
E-4	Final - Electrical
E-5	Other: _____

PLUMBING INSPECTIONS	
Code	Description
P-1	Water Heater/Boiler
P-2	Grease Trap
P-3	Gas Test
P-4	Water Line
P-5	Sewer Line
P-6	Underground Plumbing Rough
P-7	Final - Plumbing
P-8	Final - Gas
P-9	Final - Compressed Air & Vacuum
P-10	Other: _____

MECHANICAL INSPECTIONS	
Code	Description
M-1	Cooling Tower
M-2	Chiller
M-3	Chiller Piping
M-4	DX Unit
M-5	Mechanical Rough-In
M-6	Furnace
M-7	Fume Hood
M-8	Air Handling Unit
M-9	Fan Coil Units
M-10	Final - Mechanical
M-11	Other: _____

FIRE INSPECTIONS	
Code	Description
F-1	Sprinkler Rough
F-2	Fire Suppression Systems
F-3	Fire Alarm System Rough-In
F-4	Final - Sprinkler
F-5	Final - Fire Extinguisher
F-6	Final - Alarm & Strobe
F-7	Other: _____



**UNIVERSITY OF NORTH TEXAS**  
OFFICE OF FACILITIES MANAGEMENT AND CONSTRUCTION

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**CERTIFICATE OF OCCUPANCY**

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**Project Information:**

*(Project Location)*

**Risk Management 121E**

*(Department Name)*

*Risk Management*

*(Project Description)*

*Reconfigure current cubicle.*

*(TMA Number)*

**11292**

*(Project Manager)*

*Lacey Almager*

The work performed under this project request has been reviewed and found, to the Project Manager's best knowledge, information, and belief, to be substantially complete. Substantial completion is the stage in the progress of the project when the project or designated portion is sufficiently complete (in accordance with the construction documents) that the Department can occupy or utilize the space for its intended use. The date of substantial completion of the project is the date of issuance established by this certificate, which is also the date of commencement of applicable warranties.

Issuance of this certificate does not preclude completion of any remaining punch list items.

The occupant accepts the project as substantially complete as indicated below:

\_\_\_\_\_  
*Client Representative (Printed Name)*      \_\_\_\_\_  
*(Signature)*      \_\_\_\_\_  
*(Date)*

\_\_\_\_\_  
*FMC Project Manager (Printed Name)*      \_\_\_\_\_  
*(Signature)*      \_\_\_\_\_  
*(Date)*



**UNIVERSITY OF NORTH TEXAS**  
OFFICE OF FACILITIES MANAGEMENT AND CONSTRUCTION

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**CUSTOMER SATISFACTION SURVEY**

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DATE:

**Project Information:**

**Author Information:**

TMA Project #:

Name:

Project Location:

Title:

Department Name:

Phone Number:

Project Manager:

Email:

1) How satisfied were you with the method in which you reported your project request to Facilities Management & Construction, and with the amount of time it took Facilities Personnel to contact you regarding your request?

2) How well did the Project Manager explain the process?

3) How satisfied were you with the level and/or frequency of communication you experienced with the Project Manager throughout the process?

4) How satisfied were you with the time taken to complete your project?

5) How satisfied were you with the service you received from the project management staff?

6) How satisfied are you with the overall design and functionality of your new space and/or furnishings?

Please enter any comments, suggestions, or other feedback you have:

Please return completed form using one of these three methods:

<i>Electronically:</i> Scan completed form and send to: <a href="mailto:tessa.ryles@unt.edu">tessa.ryles@unt.edu</a>	<i>Facsimile:</i> (940) 565-4650 Attn: Tessa Ryles	<i>Interdepartmental Mail</i> Facilities – Main Office Attn: Tessa Ryles
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For most current forms, visit P:\Fac\Fmc\PROJECTS Directory\\_TEMPLATE FOLDER (copy don't move)\Floor\11xxx\_Name\Forms





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**STEPS INVOLVED IN DESIGN & CONSTRUCTION OF RENOVATION PROJECTS**

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***WHAT TO EXPECT***

There are a series of phases involved in FM&C projects. The number of steps and length of time spent in each phase varies depending on the specific scope of work for individual projects, but the framework of the process is fundamentally the same.

**STEP 1: SUBMISSION OF PIW AND PROJECT ASSIGNMENT**

Upon receipt of a Project Initiation Worksheet (PIW), the project request is entered into Facilities' project tracking system and is assigned. Depending on the size and scope of the project, it may be managed by an FM&C Project Manager (PM) or by Facilities Maintenance. Typically, projects over \$3,500 or that require more than one specific trade are handled by FM&C. Once the PM is notified that they have been assigned a new project, they will contact the client listed on the PIW form within three to five days.

**STEP 2: PROGRAMMING AND DISCOVERY**

The PM will set an appointment to have an initial discussion with the client contact regarding what the request entails. Once those details have been thoroughly discussed, the PM will return at a later date to perform a field verification on the space(s) affected by the project. In unoccupied spaces, the PM will perform the field verification as quickly as possible. In occupied spaces, the PM will coordinate with the occupants' schedule.

During the discovery phase, the PM seeks to identify existing site conditions that may affect the project scope. For example, when creating two offices out of one larger room, the heating and air conditioning must be adjusted accordingly. Likewise, additional power and data may be required. Because these details will affect the total price of the project, the PM ensures that adequate attention has been paid to all relevant details before moving forward.

**STEP 3: SCHEMATIC DESIGN/ DESIGN DEVELOPMENT**

Once the PM has performed a field verification, they will begin developing preliminary conceptual drawings for discussion and review with the client. Depending on how complex the scope of work is, this phase may take several passes to accurately represent the client's true design intent.

**STEP 4: CONSTRUCTION DOCUMENTS**

After a design has been approved, the PM will move forward with fully fleshing out all the details needed to create a set of drawings that a contractor can use to build out the renovation project. This phase of the project requires close coordination with several different parties within Facilities and also includes an internal design review process to collect Facilities-wide feedback to ensure the thoroughness and accuracy of the plans.

**STEP 5: PROJECT ESTIMATE**

When construction drawings are completed, the PM works to develop a comprehensive budget estimate that is representative of the requested design and all affected site conditions and infrastructure. The project estimate is reviewed by the Facilities Estimator to ensure that it aligns with historical data and industry pricing. Then the estimate and final drawings are presented to the client for final review and signature. Client signature is the notice to proceed with the project.

**STEP 6: PROJECT PROCUREMENT**

Once the PM has received signed drawings and the project estimate has been approved by both the account holder and the Budget Office, the PM will withdraw the project funding and begin requesting purchase orders and work orders for work to commence. All procurement must adhere with pertinent purchasing laws and guidelines.

Prior to the start of construction, a Pre-Construction Meeting is held by the PM and attended by the project team, including the contractor and any subcontractors, as well as various internal parties such as Risk Management, UNT Telecomm and Datacomm, etc. At this time, the contractor will provide a proposed construction schedule, which the PM will then review and discuss with the client contact.

**STEP 7: CONSTRUCTION ADMINISTRATION / FURNITURE INSTALLATION**

While the contractor is physically responsible for the construction, the PM must ensure the project is built according to the plans.

During construction, the PM will monitor and oversee the construction site at regular intervals usually daily and will keep the client informed on progress. The client may request to view the construction site but must be escorted by the PM with prior notice.

**STEP 8: MOVE-IN**

When construction is complete, the PM will inspect the project with the client. If all is satisfactory and the project is ready for move-in, the client will be asked to sign a certificate of occupancy. After move-in the client will be asked to complete a customer satisfaction survey.





**UNIVERSITY OF NORTH TEXAS**  
OFFICE OF FACILITIES MANAGEMENT AND CONSTRUCTION

**FACILITIES OVERVIEW AND FEES**

UNT Facilities consists of Facilities Management and Construction, Facilities Maintenance, and Facilities Business Services.

Facilities Management and Construction is responsible for space management and adherence to the State of Texas reporting requirements regarding space allocation and building use; for insuring that renovations and construction meet the needs of the University while complying with the Master Plan, UNT Design Guidelines, and current building codes; and for maintaining the historical record drawings and manuals relating to Facility buildings and modifications.

Facilities Maintenance is funded for the operation, maintenance, and repair of the University of North Texas Facilities, administers the energy management program, and identifies the capital replacement (deferred maintenance) needs of the University.

Facilities Business Services provides IS, personnel and budgeting support to all of Facilities and supports all campus organizations through operation of the warehouse, automotive services, recycling and moving services.

UNT Facilities maintenance and operation funding does not cover the cost of design, review, construction, and / or documentation of projects that require modification to UNT buildings or grounds and these activities are funded from either HEAF or departmental funds. A Project Initiation Worksheet will be completed for each project in excess of \$3,500, or any project requiring wall, door, or window modifications regardless of cost, and at that time one of four methods for reimbursing Facilities for design and administration costs will be assigned. These charges are in addition to the direct costs of construction, which may either be in-house or contracted out.

1. Most projects will be charged a flat 12% fee. This fee reimburses Facilities for project design, documentation, code compliance, state reporting, construction administration, and project supervision.
2. For a few projects, usually the larger ones, an outside consulting firm will be used for the architectural or engineering design. As an example, the services of an Architectural firm may be contracted for the design of the project. If this is the case, the project will be charged a flat 4.5% Facilities Project Management fee plus the consultant's fee.
3. Some projects may have special requirements where the fee structure listed above may place an undue burden on the project; an example of this would be a project that combines maintenance or deferred maintenance dollars with the renovation budget. For these projects, the flat fee may be waived in lieu of an hourly rate with a "not-to-exceed" total. This hourly rate is published elsewhere on the website, and the decision to apply the hourly rate in lieu of the fees will come from the Senior Construction Manager in consultation with the client. The hourly rate for design applies to design work by Facilities Maintenance as well as to design work by Facilities Management and Construction.
4. For large capital projects that are managed by the System OFPC office that require MEP services, the Senior Construction Manager will negotiate fees and/or hourly rates with the UNT System.
5. For large capital projects that are managed by the System OFPC office that require FF&E services, a fee of 12% on the FF& E budget will be charged to the System project.

The Project Initiation Worksheet serves as the documentation of the agreement between Facilities and the user. In addition to spelling out all costs to be paid by the Project, "sign-off" at completion by the user will be required before charges are made by IDT. In addition, all increases to size, scope, and cost will be noted on either the PIW or the work order.

**FACILITIES HOURLY RATES**

DESIGN / ENGINEERING	\$100 per hour
SKILLED TRADES	\$35 per hour
❖ Electrical, AC, plumbing, carpentry, painting	
MOVING SERVICES	
FACILITIES AUTOMOTIVE SHOP	



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## MEMORANDUM

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SUBJECT: Facilities 100% Billing Procedure

DATE: June 4, 2009

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As part of Facilities' continued mission to improve the services that we offer to members of the UNT Denton community, we have recently taken time to assess the success of the 50/50 billing procedure implemented in the Spring of 2008. Last year, Facilities spent a great deal of time reviewing the methodology utilized by other institutions of higher education, and determined that introducing a 50/50 or 100% billing system would greatly improve the service that we provide in the following ways:

- Instead of a steady stream of small charges hitting the project account, users see either two partial bills or one full bill and are better able to identify the status of the billing for the project
- Users are offered a guaranteed price by Facilities, ensuring that any cost overruns will be covered by Facilities

Before fully committing to a 100% billing system, Facilities began the process of billing users 50% of the approved budget at the outset of the project and the remainder at the end. In the time since, we have studied the results and have determined that it would be of even greater benefit still to move forward to a 100% billing system. This process provides the same benefits as a 50/50 billing process, but with the added advantage of timely billing – users will no longer have to continue to track the remaining 50% until the project is closed and the final percentage is debited, a process that can sometimes take several months.

We feel strongly that this final step in improvement of our billing process will provide the most customer service oriented approach possible in our unrelenting goal of providing superior service at a lower cost than outside contractors.

If you have any questions about this new billing process, please contact Bobbie Tassinari (Associate Director of Business Services) or Helen Bailey (Associate Director of Facilities Management and Construction).



**UNIVERSITY OF NORTH TEXAS**  
FACILITIES MANAGEMENT & CONSTRUCTION

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**DATE:** 03/23/10

**TO:**

Rodney McClendon  
Wendy Wilkins  
Gilda Garcia  
Lisa Baronio  
Rick Villareal

Vish Prasad  
Deborah Leliaert  
Elisabeth With  
Jean Bush  
Maurice Leatherbury

**CC:**

Charles Jackson  
Bobbie Tassinari  
Jeff Brown  
Donna Asher  
Darlene Callahan

**FROM:** Helen Bailey, Director for Facilities Management & Construction

**RE:** Project Estimate Charges

Due to the amount of time that is invested in providing detailed budgetary figures, Facilities will begin assessing an estimation surcharge on cost estimates provided to departments.

Two different methods currently exist to obtain a budgetary estimate: the Preliminary Request for Estimate (PRE) and the Project Initiation Worksheet (PIW). Charges will be assessed as follows:

**PRE:** The purpose of the PRE estimate is to assist UNT faculty and staff when seeking funding such as for grant applications or HEAF allocation proposals. These types of estimates are rough orders of magnitude and will continue to be provided at no cost to the department. However, estimates are limited to one with one revision per project.

**PIW:** The purpose of the PIW estimate is to provide a guaranteed cost for the specified scope of work for a given project. When a pricing inquiry is submitted as a PIW, a charge of \$500 will be assessed if the project is cancelled prior to construction or implementation. The charge is per estimate, and will be assessed on each version developed.



**UNIVERSITY OF NORTH TEXAS™**  
**FACILITIES MANAGEMENT & CONSTRUCTION**

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**DATE:** 03/10/10

**TO:**

Rodney McClendon  
Wendy Wilkins  
Gilda Garcia  
Lisa Baronio  
Rick Villareal

Vish Prasad  
Deborah Leliaert  
Elisabeth With  
Jean Bush

**CC:**

Charles Jackson  
Bobbie Tassinari  
Jeff Brown  
Donna Asher  
Darlene Callahan

**FROM:**

Helen Bailey, Director for Facilities Management & Construction

**RE:**

**Requirement for Architectural and/or Engineering Services for Projects over \$50,000 in Construction Cost**

Due to a need for more rigorous oversight of regulatory and code requirements, effective immediately, all projects with an expected construction cost over \$50,000 that are managed by the office of Facilities Management and Construction are required to include the professional services of an Architectural or Engineering firm for the design work.

Though this requirement may increase the project timeline, we are fortunate to have at our disposal a number of open contracts with architectural and engineering firms in the form of Indefinite Delivery Indefinite Quantity (“IDIQ”) contracts. This eliminates the need for a lengthy professional services procurement process for an individual project and is therefore less time consuming.

**The Top 10 Reasons for Rejecting the  
First Set of Submittals for a Fire Alarm System**

10. The submittal books are missing a table of contents with equipment model numbers, quantities and page numbers for the associated specification sheets.
9. Specification sheets are not marked to clearly show which pieces of equipment are being used and which are not being used.
8. Secondary power calculations are based on the actual quantities and are not based on the total allowable load as specified.
7. The equipment list/table of contents does not agree with the secondary power calculations. (NOTE: IF your calculation program requires that you "add equipment" to simulate a full load, do this as a separate line item and clearly label it.) See 8 above.
6. Wire size calculations – if provided at all – are not based upon 100% circuit loading as called for in the specifications. After all, even engineers screw up now and then, and owners change floor plans requiring circuits to be added onto at some later date.
5. Speakers or horns do not meet the specifications for required output and/or variable adjustment capability. They may not all be the same. See the drawings and check the specifications.
4. The riser diagram, if provided at all, does not meet the specifications for required content and/or does not match the equipment list/table of contents.
3. The number of NAC circuits being provided results in circuits being loaded beyond the maximum permitted by the specifications. That's right – the specs have a limit so that there is a capacity for changes or future growth.
2. Transient voltage surge suppression (TVSS) was either not included in the submittal or is of the incorrect type.

...and the number 1 reason...

1. Strobes are not the correct intensity. No, they are not all 15 cd. Some may be 60 or 110 cd. See the drawings. Know the NFPA 72 rules. Make sure the battery calculations agree with the quantities of different intensity strobes being used.



**UNIVERSITY OF NORTH TEXAS**  
OFFICE OF FACILITIES MANAGEMENT AND CONSTRUCTION

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**GENERAL CONSTRUCTION GUIDELINES**

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**UNFAVORABLE CONSTRUCTION CONDITIONS**

During unfavorable weather, wet ground, or other unsuitable construction conditions, the Contractor shall confine his operations to work, which will not be affected adversely thereby. No portion of the work shall be constructed under conditions which would affect adversely the quality or efficiency thereof, unless special means or precautions are taken by the Contractor to perform the work in a proper and satisfactory manner.

**WATER FOR CONSTRUCTION**

Temporary water service for construction shall be provided to Contractor at no cost except for Contractor's hook-up to existing system.

**ELECTRICITY**

Electricity for light, power, and construction purposes will be provided by the Owner without cost. The Contractor assumes the cost to run any lines and make any connections required; points of connections to be determined by the Owner.

**TOILETS**

Temporary toilet facilities shall be furnished by Contractor as required.

**VEHICLE REQUIREMENTS**

1. Contractor may have one work vehicle at the job site.
2. Workmen's vehicles will be assigned parking spaces for duration of the project.
3. Vehicles at the job site will be marked with company logo or other means of identification.
4. Contractor may have necessary equipment at the job site, i.e. tractors, dump trucks, cranes, etc.
5. Movement of vehicles will only be during class periods. No vehicle movement of any type during class changes.
6. A copy of the "contractor Checklist" will be filled out for each project or contractor involved by the Project Coordinator and sent to the Police Department prior to start of the project.

**DEBRIS HANDLING**

1. Contractor shall be responsible for the removal of all trash and debris generated by the installation on a daily basis.
2. **Trash and debris shall be disposed of in a trash receptacle furnished by the "Contractor" or disposed of off campus.**
3. Location of any contractor-provided trash receptacles to be coordinated with and approved by **PM.**
4. Use of University trash receptacles strictly prohibited.

## **FINAL CLEANING**

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1. The contractor is responsible for cleaning all surfaces affected by construction prior to turning over the completed job site.
2. Final cleaning includes vacuuming and/or mopping all flooring within the scope of work, cleaning existing and new glazing, and wiping down any surfaces that may have collected dust or debris during construction.
3. Employ experienced workmen, or professional cleaners, for final cleaning.
4. In preparation for substantial completion, conduct final inspection of sight-exposed exterior surfaces.
5. Repair, patch and touch up marred surfaces to specified finish, to match adjacent surfaces.
6. Broom clean paved surfaces; rake clean other surfaces of grounds.
7. Maintain cleaning until project or portion thereof is accepted by the Owner.

## **POST-CONSTRUCTION INSPECTION**

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Prior to expiration of one year from date of substantial completion, Owner and Contractor will jointly make visual inspection of the project to determine whether correction of work is required in accordance with provisions of the Contract.

Owner will promptly notify Contractor, in writing, of any observed deficiencies.

## **FURNITURE DELIVERIES**

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1. Furnish and set inside the Building, lab furnishings as specified.
2. Vendor will be responsible to deliver awarded items to their intended area of the building be it first, second, or third floor. Vendor may use the freight elevator to distribute the furniture to the second and third levels, but **must be trained on proper usage of freight elevators PRIOR to installation.**
3. Furniture shall be delivered (FOB Destination) to the Building located at Denton.
4. Deliveries shall be coordinated with **PM**. If you choose to have furnishings drop-shipped to the site, you **MUST** have a representative on site to meet the shipment and all deliveries must be scheduled with the **PM at least 24 hours in advance.**
5. Contractor shall be responsible for the removal of all trash and debris generated by the installation on a daily basis.
6. **Trash and debris (including demolished millwork) shall be disposed of in a trash receptacle furnished by the "Contractor" or disposed of off campus.**
7. Location of any contractor-provided trash receptacles to be coordinated with and approved by **PM**.
8. Use of University trash receptacles strictly prohibited.

## **FURNITURE- SITE EXAMINATION**

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1. Examine area prior to installation of furnishings for conditions that will adversely affect the execution and quality of work and apprise the "Owner" of any such conditions.

## **FURNITURE- INSTALLATION**

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1. Coordinate installation of furniture with Project Coordinator **at least** 72 hours prior to installation date. Drop shipments must be met by installation crew.



# UNIVERSITY OF NORTH TEXAS

## OFFICE OF FACILITIES MANAGEMENT AND CONSTRUCTION

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### CONTRACTOR SAFETY & WORK PRACTICES

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All contractors performing work for UNT Denton Facilities must adhere to these rules in conjunction with all Federal, State and Local requirements. Interpretation of these rules shall be made by the designated representative for UNT Facilities.

#### GENERAL REQUIREMENTS

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1. All unusual incidents (accidents, damage to property, etc.) should be reported immediately to the UNT Facilities Project Manager or their designee. Emergencies should be called to 911.
2. Appropriate steps should be taken to protect the faculty, staff, and students from hazards created by work site operations. The site shall be separated from public access by fences, barricades, or other appropriate security measures as needed. All hazardous openings or excavations must be barricaded at all times unless the work requires their temporary removal. At no time leave the hazard unattended.
3. UNT complies with the State of Texas Indoor Air Quality guidelines and notifies building occupants of any work that might impact the air quality. Contractor is responsible for identifying and informing the Facilities' representative of potential work-related airborne contaminants that may be produced from disturbance of building materials. Contractor shall be responsible for designing and implementing appropriate control measures and monitoring indoor air quality (IAQ). Contact Risk Management to have 5-Day Notice placed in their designated locations.
4. Texas Excavation Safety System (1-800-DIG-TESS) must be notified 48 hours prior to excavating, digging, or trenching on the UNT Campus. This applies to all excavations, regardless of depth and whether internal or external to structures.
5. A Confined Space Entry permit must be obtained before any contractor employee can enter an excavation of over 4 feet, a tank, or confined space. It is the responsibility of the contractor to inform the UNT Facilities representative of the need for a Confined Space Entry permit.
6. A Hot Work permit must be obtained before any contractor employee can grind, weld, solder, braze, or use a cutting torch, or gasoline powered tool inside a building. It is the responsibility of the contractor to inform the UNT Facilities representative of the need for a Hot Work permit.
7. All documentation required by EPA regarding the removal or addition of refrigerants, including installation or removal of appliances containing refrigerants, is to be provided to the Facilities Compliance Coordinator at or before invoicing for services rendered.
8. Documentation of processes and procedures required by the EPA in the abatement and monitoring of asbestos containing materials are to be provided to the Facilities Compliance Coordinator at or prior to invoicing for services rendered.
9. Flammable and combustible wastes must be removed from the premises at the end of each working day.
10. Any work requiring the deactivation/disconnection of an active fire protection system must be planned and scheduled so as to limit the actual downtime to the absolute minimum. The UNT Fire Shop Supervisor must be notified in advance.
11. "Danger – Work Overhead" signs must be posted in a conspicuous manner while performing overhead work. If there is a danger of sparks from cutting, etc., or other materials falling, the area below must be roped off completely. Contractor should be aware of all fire protection devices in the work area and potential for accidental initiation. Contact UNT Fire Shop with inquiries.
12. Fire doors must not be blocked or fastened open. Wires, cables or hoses, etc. shall not pass through a doorway and prevent the fire door from closing completely.



13. Due to simultaneous construction activities, UNT is considered to have disturbed an area greater than 5 acres for the purposes of TCEQ permitting. Obtain appropriate storm water permits and provide appropriate measures to protect catch basins, storm drains, streams, etc.
14. Contractor is responsible for protection of buildings, roofs, streets, trees, shrubbery, and lawn areas from damage.
15. Contractors are required to use *Trak Mats* (or similar) to protect the grass/ground anytime it is necessary for equipment or vehicles to enter unpaved areas. UNT Facilities has track mats available for loan, free of charge, to contractors actively doing work on our campus. The contractor should work through their facilities contact to obtain the mats and sign them out. Contractors will be required to complete a checkout/in form prior to receiving any mats. Contractor is responsible for costs of repair to grounds areas caused by not following this requirement. Contractor is responsible for any lost or broken mats at a cost of \$240.00 each. Condition assessment will be made at check-in. Final payment to contractor will be withheld until all mats are returned in satisfactory condition.
16. Contractors shall comply with OSHA Hazard Communication Standard. Material Safety Data Sheets for each hazardous chemical shall be readily available and located on site.
17. The contractor shall observe the facility speed limits when moving any type of vehicle. Vehicles cannot be moved on inner campus streets during class changes. Care should be taken to park in service driveways and to not block sidewalks or pedestrian traffic. Parking on the grass, around mall areas, and under trees is not allowed. Parking on pedestrian sidewalks is strictly prohibited. Unload materials/equipment and move vehicle to designated parking area. Anytime a sidewalk is blocked due to construction, install construction fencing around the work area so it is clearly identifiable for the visually impaired.
18. Contractor personnel shall not connect to or adjust UNT equipment unless authorized by the Facilities representative. Permission should be obtained from the Facilities representative before operating electrical disconnects and circuit breakers.
19. The contractor's employees will be permitted access only to those areas necessary for the performance of contractual work. Contractor's employees or subcontractors will not be allowed to tour or roam around the facility or to enter areas not necessary for the performance of their work.
20. The job site must be as clean and orderly as possible at all times. Housekeeping is the contractor's responsibility. Contractor is responsible for providing dumpster, pick up, and scheduling removal. The use of UNT dumpsters is prohibited. The Facilities Representative will designate an area for material staging.
21. The contractor is responsible for the conduct of his employees and subcontractors and shall enforce good order and conduct at all times.
22. All equipment owned or operated by the contractor must be in good condition with safety equipment intact.
23. Contractor employees are required to wear professional and appropriate clothing with the company name prominently displayed or wear identification badges with the employee and company name. Apparel displaying profanity or lewdness is not acceptable.
24. Contractor employees and subcontractors shall use appropriate PPE.
25. Contractor employees shall not possess or use alcoholic beverages or regulated drugs not prescribed by a physician.
26. Contractor employees shall not possess explosives, firearms, ammunition, or other weapons.
27. Contractor vehicles will be appropriately marked with the company name or shall display a temporary parking permit.
28. When a work stage is complete and a progress invoice is submitted, the Facilities Project Manager will be the person who authorizes payment. Requesting progress inspections at the appropriate times will avoid delays in payment.
29. Prior to completion and demobilization, UNT representative and Contractor shall inspect the jobsite to ensure all project material and debris has been cleaned up and properly disposed of.
30. For accidents, injuries, or illness emergencies call 9-1-1. For other emergencies, contact the UNT Police at 940-565-3000. Immediately report all related work accidents, injuries, and illnesses to your University of North Texas Facilities contact.

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**The Top 10 Reasons for Walking Away from the  
First Scheduled Acceptance Test of a Fire Alarm System**

10. Unable to access all rooms for testing devices. It's obvious the door is locked. Yes, a 100% test means everything. It's your (contractor's) test, therefore it's your job to schedule the test and coordinate access.
9. Fire or smoke barrier penetrations have not been sealed. So what if you did not make the hole but just used it. Seal it – with properly rated and listed material. Yes, this too is part of the Specifications and Drawing Notes.
8. Unprepared to properly test waterflow switches. If you're afraid of water – or sprinkler systems – then you should have coordinated with another contractor to conduct the test. Yes, water must be flowed. Yes, it's in NFPA 72.
7. Some strobes were not set for the correct value. No, they are not all 15 cd. Some may be 60 or 110 cd. See the drawings. Know the NFPA 72 rules.
6. Some speakers were not set at the correct power tap or horns were not set for the correct output. No, they are not all the same. See the drawings and check the specifications.
5. Labeling is missing or incorrect. Yes, junction boxes, terminal cabinets, monitor modules and control modules are supposed to be labeled. See the specifications. And, don't forget this is a requirement of the Electrical Code also – though not as stringent as the project specs.
4. All work has not been completed and tested as part of the contractor's pre-test (which is also a 100% test). No, installing that last device on the morning of the test and testing it as I arrive does NOT meet the project specifications. No, adding that device or reprogramming after I find a problem is NOT OK. Look-up the definition and requirements of *re-acceptance tests* in NFPA 72.
3. Insufficient number of test personnel present. The Owner, Engineer and Fire Department personnel are witnesses – they don't touch anything. To properly test, you need at least: one person to activate each device; one person to tell us what is displayed on the panel; one person (at least) to tell us if fans, dampers, elevators, deluge systems or other controlled systems operated or did not operate for each device that is alarmed. Yes, we want to know that the fans did not stop or that the deluge solenoid did not release when they were not supposed to. That's just as important as verifying that they started or operated when they were supposed to start or operate – sometimes more important.
2. Improper spacing of smoke detectors or strobes. OK, so if you scale the drawings the symbol for smoke detector is two to four feet in diameter. But the center is about where that detector needed to be. Besides, you're supposed to know the spacing requirements of NFPA 72. And yes, you can go more than 15 ft from the wall and more than 30 ft between detectors – under the right circumstances. Read the code. Check the specifications and drawing notes.

...and the number 1 reason...

1. The closeout documents were not provided. You know: Partial Certification of Completion; as-built drawings – floor plans and riser revised to reflect changes and installed conditions; copy of contractor's pre-test documentation; point list; copy of the program; revised battery calculations; revised wire size calculations; owner's manuals for all equipment; complete operating instructions; one page operating instruction sheet; written record of all system passwords. See the Specifications for specifics including electronic copies of software database. Yes, all this is spelled out in the Specifications. Yes, most of these are required by NFPA 72 also.



UNIVERSITY OF NORTH TEXAS  
OFFICE OF FACILITIES MANAGEMENT AND CONSTRUCTION

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MEMORANDUM

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RE: **Furniture Procurement Options**

DATE: **9/21/2009**

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To Whom It May Concern:

The following options are available to those who wish to procure office furnishings for University use:

1.) **Submission of a Project Initiation Worksheet (PIW)**

The Office of Facilities Management and Construction has a full staff of designers and an extensive product library in order to assist the UNT community with procurement of furnishings. Services include space planning to identify the most efficient use of space, selection of the most appropriate furnishings for the project, finish selections to compliment the aesthetics of the space in question, processing of requisition(s), scheduling delivery, and service of any warranty issues for the life of the product's warranty. If you wish to take advantage of this option, simply fill out and submit a Project Initiation Worksheet (PIW) by visiting the Facilities website: <http://www.facilities.unt.edu/docs/piw.pdf>.

2.) **Consult List of Recommended HUB Furniture Dealers**

Through many years of experience, Facilities has developed a list of recommended HUB furniture dealerships that have consistently provided quality products and superior customer service. Should you choose not to utilize Facilities' design staff, please contact FM&C for a list of preferred dealers that would be happy to assist you.

3.) **Procurement without Facilities' Involvement or Recommendations**

Should you choose to proceed with furniture procurement without Facilities' involvement or utilizing a vendor/manufacture that is not on Facilities' list of recommended HUB dealers, you will be responsible for handling all warranty issues via the original dealer or manufacturer from whom you purchase the product. If you are unable to coordinate resolution of any issues with the original dealer/manufacture, Facilities can address such matters as time allows, to be billed at the standard hourly rate.

For questions or concerns regarding these options, please feel free to contact Helen Bailey.



# UNIVERSITY OF NORTH TEXAS

OFFICE OF FACILITIES MANAGEMENT AND CONSTRUCTION

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## FURNITURE STANDARDS & PERFORMANCE GUIDELINES

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When assisting departments on campus with furniture procurement, Facilities Management & Construction makes selections based on a number of factors: industry standards, availability of products (including flexibility/breadth of line and cooperative contracts), previous experience (with both manufacturer and dealership), and applicable warranty information.

### **INDUSTRY STANDARDS**

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Our first priority is to ensure that the product that we procure meets all applicable standards related to public health, safety, and welfare. There are two primary associations that provide standards and guidelines by which interior furnishings are judged – BIFMA (Business and Institutional Furniture Manufacturer’s Association) and ACT (Association for Contract Textiles). BIFMA standards are intended to provide manufacturers, specifiers, and users with a common basis for evaluating safety, durability, and the structural adequacy of the specified furniture, while ACT has developed guidelines by which to judge performance of upholstery textiles applied to interior furnishings (guidelines include flammability, wet and dry crocking, colorfastness to light, physical properties such as pilling and seam slippage, and abrasion).

### **AVAILABILITY OF PRODUCTS**

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Our second priority is to make decisions in the best interest of the University. Our goal is to purchase furniture that is durable and will withstand use over a lengthy period of time, but also to select furniture lines that provide many options for future growth. One feature of furniture lines that are less expensive is that the line offering is extremely narrow (this is one way that furniture manufacturers can provide furniture at deep discounts, by decreasing the number of standard pieces available). By upgrading to a mid-tier line, there is an assurance that in the future, if a single office (or even an entire office suite) needs to be relocated or reconfigured, it can be done reusing existing furniture by merely supplementing with what few new pieces are needed, thereby saving the department a great deal of money.

In addition, many lines of furniture are available for purchase referencing cooperative purchasing contracts that provide much deeper discounting structures than if purchased outright. Facilities works closely with UNT Purchasing to identify contracts that are the best value for the University, and have several years of experience in the procurement procedures involved. Utilizing cooperative contracts saves the University money, but also saves a great deal of time that could be spent navigating the bid process.

### **PAST EXPERIENCE**

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The third factor that Facilities takes into consideration when selecting furniture is our extensive past experience with various furniture manufacturers and local dealerships. A large part of what we do involves furniture procurement, and therefore, we have established relationships with local dealers based on the customer service they provide both during the order process and afterwards, when servicing the warranties on products purchased. By allowing us to assist you with your furniture needs, you benefit from the experiences we have had in the past and can be sure that we will go to great lengths to select manufacturers and dealers who understand the unique needs that institutions of Higher Education have.

## **WARRANTY**

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Our final priority is to ensure that the products that we purchase for University use have warranties that align with the level of usage products on our campus will receive. In addition, the same relationships that we have developed with local dealers are of benefit during the warranty period, as we're able to rely on those entities to service warranty issues in a timely and effective manner.

Facilities will always make furniture purchases with these four factors in mind, and because we use these criteria when making selections, we can be confident that the administrative charges assessed at the close of each project will be sufficient to cover any time spent assisting with warranty issues. However, if a project requires that Facilities match existing product or purchase new product that does not meet the aforementioned criteria (either for budgetary or aesthetic reasons), additional administrative charges may apply during the warranty period if excessive repairs are required.

## **REFERENCES**

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BIFMA – Business and Institutional Furniture Manufacturer's Association  
<http://www.bifma.com/standards/index.html>

ACT – Association for Contract Textiles  
[http://www.contracttextiles.org/main.php?view=5\\_1](http://www.contracttextiles.org/main.php?view=5_1)



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DELIVERY/INSTALLATION GUIDELINES

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1. **SCHEDULING DELIVERIES**

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- a. Contact the appropriate UNT Facilities Project Manager with possible delivery times
- b. You **MUST** receive a confirmation from the UNT Facilities PM to schedule the delivery (voicemails and emails that do not receive a response are **not** sufficient notice to proceed with scheduling a delivery)
- c. You must provide the UNT Facilities Project Manager with a copy of any installation drawings that the crew will be working from so that they can be checked for accuracy prior to the installation itself

2. **INSTALLATION CREW**

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- a. The installation crew must include a Team Lead who is capable of communicating with both the crew and the UNT Facilities PM
- b. The Team Lead must plan on being present to oversee at least 50% of the installation
- c. The installation crew should take directives **ONLY** from the UNT Facilities PM (or appointed delegate); requests from occupants/end users should be redirected to the UNT Facilities PM (or appointed delegate)

3. **ARRIVING AT UNT**

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- a. The installation crew should be provided with a physical address, driving directions, and the UNT Facilities PM's phone number prior to leaving the warehouse – UNT Facilities is happy to provide this information, with the understanding that it will be passed along to the crew
- b. The Team Lead should contact the UNT Facilities PM upon arriving in Denton so that a delegate from Facilities can meet the crew at the building and assist them in locating the job site – if the delivery was scheduled appropriately, the PM will be aware that the crew is coming and will have blocked out time for this activity. ***If the delivery has NOT been properly scheduled, UNT reserves the right to ask the crew to wait and/or leave and come back another day***
- c. All vehicles belonging to the crew, commercial or personal, are required to obtain a temporary parking permit. Upon calling the UNT PM to notify them of the crew's arrival on campus, the PM (or appointed delegate) will provide the crew with temporary permits for the number of vehicles specified upon arrival on the jobsite. ***The owner of any vehicle that does not obtain a permit and receives a parking ticket will be held individually responsible for the citation.*** In addition, the lead installer will be required to wear a Contractor Badge that easily identifies him as the head of the crew. This badge must be returned to the PM (or appointed delegate) prior to leaving campus (temporary permits can be discarded at the end of the day)

4. **DOCUMENTATION**

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- a. The Team Lead should arrive prepared to note any exceptions or damages to the delivery. The UNT Project Manager will not document these items for the installer; it is the responsibility of the dealership / installation crew
- b. The installation crew should arrive with a duplicate copy of the delivery ticket(s) to leave with the UNT Project Manager – UNT will not be responsible for making copies of delivery documentation, and if a copy is not provided, will request that duplicates be either mailed or faxed within 48 hours of the completed installation.



# UNIVERSITY OF NORTH TEXAS

## OFFICE OF FACILITIES MANAGEMENT AND CONSTRUCTION

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### MOVE PREPARATION

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#### PRIOR TO YOUR MOVE...

##### Have you filled out a Move Matrix for the relocation of your telephones?

Facilities works to coordinate the relocation of telephone lines so that it happens as closely as possible to the physical box move of the department's belongings. This ensures your department the least amount of "down time" during your relocation.

The tool we use to communicate such changes to CITC is called a Move Matrix, and should be filled out as much in advance of your relocation as possible. The matrix should include all telephone lines that will be relocated, as well as any faxes, networked printers, and any other special requirements within the department.

##### Do you have a copier that needs to be relocated?

If you lease a copier, the owner of the copier must relocate the equipment in order to keep from violating the terms of the lease. Once you know your move date, contact the owner of any special equipment your department utilizes so that they can send the proper technicians to handle the relocation.

In addition, please make sure Facilities is aware of any special equipment you possess so that we can ensure there is adequate power and network capabilities available in the new space for those items.

##### Have you requested keys to your new space yet?

Once your move has been scheduled, Key Request Forms will need to be filled out for all employees with the department who will need access to the new space. These forms need to be submitted to Access Control enough in advance of your move for them to be able to fulfill your request. The department is responsible for filling the forms out, submitting them, and picking up the keys when they are ready. Key Request Forms can be found on the Facilities website under "Resources".

##### Have you packed?

Each department is responsible for packing their own items. Boxes may be obtained from UNT Recycling free of charge. Please keep the following in mind:

- Allow yourself adequate time to pack
- Keep any important documents, files, or items that you may need during the move process in an easy-to-find location
- Label all boxes, miscellaneous items, pieces of furniture, and each piece of your computer equipment with a separate move label indicating the destination room number
- Pack all loose computer components in a separate box; this includes all cables, the keyboard, mouse, speakers, and any other associated accessories. **In addition, you will need to unplug your telephone and pack it and the telephone cord in the same box as your computer components.** Label the box "COMPUTER/PHONE"
- All move labels should be legible with the destination location and the associated last name of the owner
- Vertical filing cabinets do not have to be emptied if they can be locked. Lateral file cabinets over two drawers high will need to be unloaded, contents packed in boxes, and locked as well.
- All boxes should be securely sealed, especially the bottoms
- All boxes should be "one man" boxes (< 75 lbs per box)

- Items without a move label will not be moved
- **Any breakables, plants, or other fragile personal items should be moved prior to the relocation, or taken home and brought back after the move.**

Who will be the main contact within your department?

Please elect one individual to be the main point of contact throughout the relocation process and provide the Project Manager assigned to your relocation with detailed contact information for that person. Any additional move requests should be routed through this person for the Project Manager to handle.

**Please do not make requests directly to the moving contractor, as any changes to the scope of work can affect the price of the move.**

This person will need to be on-site throughout the process of the move to work in conjunction with Facilities, the moving contractor, and Telecomm.

**THE DAY OF THE MOVE...**

What time will the movers arrive?

When your move was scheduled, your Project Manager should have given you a general idea of when the movers should arrive. We cannot provide an exact arrival time, as their schedules fluctuate frequently due to traffic, weather, and even changes in scope of work at their previously scheduled jobs. We appreciate your patience and understanding.

Forwarding phone calls

Because your telephones will physically be packed in boxes during the move process, and because Telecomm will be working to relocate the extensions to the new space(s), you will not be able to answer phone calls on your land line. Any phone calls received during that "down time" will go to voicemail unless the calls are forwarded to another number. Some users choose to forward their calls to their cell phone, some choose to leave one phone unpacked and plugged in at its' current location to make and receive calls during the process (until Telecomm switches that line over to the new space), and some choose to forward calls to a main phone number, such as a receptionist. The decision of how to handle missed calls during the move process is left to the discretion of the department; however, feel free to contact your Project Manager if you have any questions or concerns regarding this aspect of the move.

Changes in scope of work

It is very common for departments to discover items that they hadn't previously planned on relocating, or items that they forgot they had. This situation is not one that should cause problems, but please keep the Project Manager apprised of any such changes so that they can keep the account holder informed of any changes that may occur to the budget cost as a result.





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EMAIL GROUP LIST MEMBERS

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**\*\*\* Always cc: your FMC Project Team when relevant \*\*\***

**FACL-FMC-PIWNotify**

Bailey, Helen; Brown, Jeff; Cook, Keith; Director of Facilities Business Services; FIMS; Henderson, Gail; Hutson, Lynda; Milan, Dick; Raadt, Laura; Ryles, Tessa

**FACL-FMC-DesignReview**

Bailey, Helen; Barkenhagen, David; Brown, Jeff; Cook, Keith; Davis, Ron; Hutson, Lynda; Hutson, Tom; Jones, Tommy; Kirkpatrick, Sharon; Lara, Sheri; Mathis, Steve; McCormick, Richard; Milan, Dick; Moran, Rod; Repka, Ron; Reynolds, Mike; Ryles, Tessa; Salsman, Randy; Stippec, Vincent; Teague, Glenn; Wiedower, Keith; Young, David

**FACL-FMC-TDComm**

Chevli, CR; Meyer, Blake; Morrow, Dowl; Primeaux, Gary; Sedgely, Kenneth

**FACL-FMC-InhouseEst**

Cook, Keith; Milan, Dick

**FACL-FMC-WithdrawFunds**

Bailey, Helen; Brown, Jeff; Carrigan, Edwin; Cook, Keith; Cook, Sherry; Director of Facilities Business Services; FIMS; Henderson, Gail; Hutson, Lynda; Madrid, Monica; McGee, Patti; Milan, Dick; Raadt, Laura

**FACL-FMC-PreCon‡**

Finch, James; Fox, Charlie; Galloway, Bryan; Hernandez, William; Jones, Tommy; Kirkpatrick, Sharon; Lara, Sheri; McCormick, Richard; Meyer, Blake; Moncus, Matt; Montalvo, Silvester; Morrow, Dowl; Nambiar, Paru; Reynolds, Mike; Wiedower, Keith

‡Note: cc: Superintendent

**FACL-FMC-POReqConst**

Bailey, Helen; Brown, Jeff; Cook, Sherry; Hutson, Lynda; Madrid, Monica; Raadt, Laura; Reynolds, Mike

**FACL-FMC-POReqFurn**

Bailey, Helen; Cook, Sherry; Madrid, Monica; Raadt, Laura

**FACL-FMC-PCardReq**

Bailey, Helen; Cook, Sherry; Harpool, Denise; Madrid, Monica; Raadt, Laura; Ryles, Tessa

**FACL-FMC-FinalConstr**

Bailey, Helen; Bojanowski, Krystyna; Brown, Jeff; Cook, Sherry; Director of Facilities Business Services; FIMS; Henderson, Gail; Hutson, Lynda; Madrid, Monica; McGee, Patti; Raadt, Laura; Reynolds, Mike

**FACL-FMC-FinalJOCFurn**

Bailey, Helen; Cook, Sherry; Director of Facilities Business Services; FIMS; Henderson, Gail; Hutson, Lynda; Madrid, Monica; McGee, Patti; Raadt, Laura; Reynolds, Mike

**FACL-FMC-RoomChange**

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Alex, Deedra; Atkins, Mary; Bailey, Helen; Bojanowski, Krystyna; Brien, Charlie; Buchanan, Lauren; Callahan, Darlene; Cates, Brenda; Cely, Jack; Chevli, CR; Curry, Jim; Datacomm; FIMS; FIST; Galloway, Bryan; Green, John; Hamilton, Lareen; Henderson, Gail; Hickman, Walter; Hutson, Chris; Hutson, Lynda; Hutson, Tom; Khoury, Debra; Martin, Lynda; McCreary, Lynn; McLaughlin, Sharon; Methner, Lynde; Meyer, Blake; Montalvo, Silvester; Moran, Rod; Morrow, Dowl; Pierce, Susan; Primeaux, Gary; Repka, Ron; Reynolds, Mike; Robertson, Keitha; Russell, Charlotte; Sedgley, Kenneth; Tapia, Luis; Varcoe, Bradley; Wallace, Linda; Welch, Doug; Wiedower, Keith; Work Control

**FACL-FMC**

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Almager, Lacey; Bailey, Helen; Bojanowski, Krystyna; Cagle, Katy; Carrigan, Edwin; Hay, Jason; Jackson, Charles; Lippert, Sarah; Martin, Lynda; O'Steen, Henry; Palacios, Peter; Pierce, Terri; Prestemon, Neely; Ryles, Tessa; Sambasivan, Mala; Wimberley, Amanda

**FACL-FMC-ProjMgmt**

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Almager, Lacey; Cagle, Katy; Lippert, Sarah; Munson, Erin; Pierce, Terri; Prestemon, Neely; Ryles, Tessa; Sambasivan, Mala; Wimberley, Amanda

**FACL-FMC-FireNotify**

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Brown, Jeff; Coomes, Mark; Hernandez, Willie; Hutson, Tom; Lara, Sheri; Mathis, Steve; McCormick, Rick; Wiedower, Keith; Work Control

# PIW Notify E-mail Example

**From:** Henderson, Gail  
**Sent:** Date  
**To:** FACL-FMC-PIWNotify  
**Subject:** New Project Request TMA#, Project Name

Greetings,

This e-mail is to inform you that a new PIW has been submitted, and a new PIW-type project has been created in TMA (please find the PIW attached hereto for your convenience):

<b>TMA #:</b>	
<b>PIW Full Path:</b>	P:\Fac\Fmc\Construction Projects\PIW\FY10\
<b>TMA Name:</b>	
<b>Description:</b>	
<b>Requestor:</b>	
<b>Requestor Phone:</b>	
<b>Project Manager:</b>	
<b>Deptid:</b>	
<b>Comments:</b>	

Tessa, please respond with a PM assignment, or if placed in queue.

*Gail Henderson*

Administrative Assistant  
University of North Texas  
Facilities Maintenance  
940-891-6853

## Wheat, Stephanie

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**To:** FACL-FMC-DesignReview  
**Cc:** FMC Project Team  
**Subject:** Design Review\_Building room #- TMA#

Hello,

[Project Name] is currently available for formal review on the table outside of Helen's office. Please stop by and review the drawing set with your comments. The drawings will be available from [date-date.]

Thank you,

**Terri A. Pierce, LEED AP**  
**University of North Texas**

*Project Manager*  
Facilities Management & Construction  
2204 West Prairie  
Denton, Texas 76201  
Phone: 940.891.6715  
Fax: 940.565.4650

Email templates shown for reference only; templates subject to periodic updates as needed.

## Ryles, Tessa

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**To:** Carrigan, Edwin  
**Subject:** Request for Estimator to Review Pricing - (Project Name, TMA#)

Ed,

I would like to request a formal review of the Budget Estimate for [Project Name]. I have attached PDF's of the estimate and drawings for you to reference.

Please let me know if you have any questions.

Thank you,

*Lacey Almager, LEED AP*

**University of North Texas**

Project Manager

Facilities Management & Construction

2204 West Prairie

Denton TX, 76201

Office: 940.565.4586

Cell: 940-783-1872

Fax: 940.565.4650

<http://www2.facilities.unt.edu/>

Email templates shown for reference only; templates subject to periodic updates as needed.

## Ryles, Tessa

---

**To:** Bailey, Helen; Brown, Jeff  
**Cc:** Ryles, Tessa  
**Subject:** Request to Review Pricing - (Project Name, TMA#)

Helen and Jeff,

I would like to request a formal review of the Budget Estimate for [Project Name]. I have attached PDF's of the estimate and drawings for you to reference.

Please let me know if you have any questions.

Thank you,

*Lacey Almager, LEED AP*

**University of North Texas**

Project Manager

Facilities Management & Construction

2204 West Prairie

Denton TX, 76201

Office: 940.565.4586

Cell: 940-783-1872

Fax: 940.565.4650

<http://www2.facilities.unt.edu/>

Email templates shown for reference only; templates subject to periodic updates as needed.

## Wheat, Stephanie

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**To:** FACL-FMC-WithdrawFunds  
**Cc:** FMC Project Team  
**Subject:** Withdraw Project Funding - [Project Name, TMA#]

[Director of Facilities Business Services,]

Attached is the signed and approved estimate for [Project Name] that includes the account number to be billed and TMA project number.

Please pull the approved project funding, in the amount of [approved total.]

Gail – could you please link the attachment to the aforementioned TMA project?

Thank you,

**Stephanie Wheat**  
UNIVERSITY OF NORTH TEXAS  
Facilities Design & Construction  
*Design Assistant*  
2204 W. Prairie St.  
Denton, TX 76201  
w. (940) 369-8012  
f. (940) 565-4650

Email templates shown for reference only; templates subject to periodic updates as needed.

## Wheat, Stephanie

---

**To:** FACL-FMC\_POReqConst  
**Cc:** FMC Project Team  
**Subject:** Request for PO - [Project Name, TMA#]

Monica,

Please prepare a purchase order using the attached proposal for the following:

1.	Project Name	
2.	TMA #	
3.	Description	
JOC Requests		
4.	Estimated Completion Date	
5.	Quote Layout: "Proposal/Statement of Work" and Page #'s "1 of x"	<input type="checkbox"/> YES <input type="checkbox"/> NO
6.	Attached List of Subs/Trades?	<input type="checkbox"/> YES <input type="checkbox"/> NO
7.	No Architectural Services?	<input type="checkbox"/> YES <input type="checkbox"/> NO

Thank you,

**Stephanie Wheat**  
UNIVERSITY OF NORTH TEXAS  
Facilities Design & Construction  
*Design Assistant*  
2204 W. Prairie St.  
Denton, TX 76201  
w. (940) 369-8012  
f. (940) 565-4650

Email templates shown for reference only; templates subject to periodic updates as needed.



**Pierce, Terri**

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**To:** FACL-FMC-POReqFurn  
**Cc:** FMC Project Team  
**Subject:** Request for PO – [Project Name, TMA#]

Monica,

Please prepare a purchase order using the attached proposal for the following:

Project Name:  
TMA Number:  
Description:

Thank you,

**Terri A. Pierce, LEED AP**  
**University of North Texas**

*Project Manager*  
Facilities Management & Construction  
2204 West Prairie  
Denton, Texas 76201  
Phone: 940.891.6715  
Fax: 940.565.4650

## Ryles, Tessa

---

**To:** FACL-FMC-PCardReq  
**Cc:** FMC Design Team  
**Subject:** Request for P-Card Purchase- Building, TMA#

Tessa,

Please place an order on your P-Card per the attached proposal for the following:

Project Name:  
TMA Number:  
Clearing Account:

Vendor:  
Vendor Contact:  
Vendor Phone Number:

Delivery Address:

Once order has been placed, please initiate creation of a work order per instructions from Bobbie Tassinari. Please copy all recipients of this email on all related correspondence.

Thank you,

Email templates shown for reference only; templates subject to periodic updates as needed.

## Wheat, Stephanie

---

**To:** FACL-FMC-FireNotify  
**Cc:** Bailey, Helen; Ryles, Tessa  
**Subject:** Fire Alarm Testing Notification

Hello-

The email is to inform you that a fire alarm test will be initiated on [Date] at [Time] in [Building/Room#.] Please forward this email notification to those who may also be affected.

Thank you,

**Stephanie Wheat**

UNIVERSITY OF NORTH TEXAS

Facilities Design & Construction

*Design Assistant*

2204 W. Prairie St.

Denton, TX 76201

w. (940) 369-8012

f. (940) 565-4650

Email templates shown for reference only; templates subject to periodic updates as needed.

## Wheat, Stephanie

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**To:** FACL-FMC-FinalJOCFurn  
**Cc:** FMC Project Team  
**Subject:** Final Completion [Project Name, TMA#]

[Director of Facilities Business Services],

This email is to notify you that the aforementioned project is complete. Please ensure that all work orders are closed and provide a reconciliation at your earliest convenience. The TMA project can now be closed.

By copy of this email to Lynda Hutson, I am initiating consolidation the paper project file.

Thanks,

**Stephanie Wheat**  
UNIVERSITY OF NORTH TEXAS  
Facilities Design & Construction  
*Design Assistant*  
2204 W. Prairie St.  
Denton, TX 76201  
w. (940) 369-8012  
f. (940) 565-4650

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## Wheat, Stephanie

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**To:** Milan, Dick  
**Cc:** FACL-FMC-FinalConstr  
**Subject:** Final Completion- [Project Name, TMA#]

Dick,

This email is to notify you that I believe construction on the aforementioned project to be substantially complete. If you are in agreement and have confirmed that there are no outstanding items remaining, please forward this email per the routing instructions below.

- Project Manager
  - Initiates close-out process by emailing Superintendent.
- Superintendent
  - If in agreement, forwards email to Lynda Hutson (carbon copy PM and **FMC-Final Completion** distribution list.)
- Lynda Hutson
  - Upon close of remaining open construction work orders, forwards email to [Director of Facilities Business Services].
- [Director of Facilities Business Services]
  - Emails acknowledgement to PM, Superintendent, Lynda Hutson, and **FMC-Final Completion** distribution list that close-out process is complete and TMA project is closed.

Thanks,

Stephanie Wheat

UNIVERSITY OF NORTH TEXAS

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Stephanie Wheat

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## Pierce, Terri

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**To:** FACL-FMC-RoomChange  
**Cc:** FMC Project Team  
**Subject:** Room Number Changes: Building, Rm No

Please note the attached plan titled: 1-25-10 345,347 Music-FINAL SET for room # change layouts.

Building: Music Building  
Suite: 345 & 347  
Department: College of Music

As a result of Facilities Project # x, the following room numbers are being changed to as follows:

xxx changed to xxx  
xxx split into xxx & xxx

Update your databases as necessary, and use the new numbers for phones, data, keys and signs.

***You have been identified as needing notification of room changes. Any modification to the list of members needs to be sent to [fims@unt.edu](mailto:fims@unt.edu).***

**Terri A. Pierce, LEED AP**  
**University of North Texas**

*Project Manager*  
Facilities Management & Construction  
2204 West Prairie  
Denton, Texas 76201  
Phone: 940.891.6715  
Fax: 940.565.4650

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## Wheat, Stephanie

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**To:** Client Name  
**Subject:** Customer Service Survey

[Client's Name,]

Attached please find a Customer Service Survey requesting your feedback regarding the [Project Name] renovation that we recently completed for you. This is not mandatory, but your participation is appreciated as we strive to improve our service.

Thank you,

**Terri A. Pierce, LEED AP**  
**University of North Texas**

*Project Manager*  
Facilities Management & Construction  
2204 West Prairie  
Denton, Texas 76201  
Phone: 940.891.6715  
Fax: 940.565.4650

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